Municipal Service Review: Parks and Recreation & Cemetery Services

Final

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Contra Costa Local Agency Formation Commission

Burr Consulting

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Acronyms

ABAG:	Association of Bay Area Governments
CEQA:	California Environmental Quality Act
CIP:	Capital Improvement Plan
CSA:	County Service Area
LAFCO:	Local Agency Formation Commission
LLAD:	Lighting and Landscape Assessment District
LOS	Level of Service
MAC:	Municipal Advisory Council
MSR:	Municipal Service Review
NA:	Not applicable
NP:	Not provided
SOI:	Sphere of influence

PREFACE

Prepared for the Contra Costa Local Agency Formation Commission (LAFCO), this report is a municipal service review (MSR)—a state-required comprehensive study of services within a designated geographic area. This MSR focuses on local agencies providing park, recreation and cemetery services in Contra Costa County.

CONTEXT

Contra Costa LAFCO is required to prepare this MSR by the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 (Government Code §56000, et seq.), which took effect on January 1, 2001. The MSR reviews services provided by public agencies—cities and special districts—whose boundaries and governance are subject to LAFCO. In order to provide comprehensive information on service provision, other service providers—private companies and public agencies which are not subject to LAFCO—may be addressed in this MSR, recognizing that LAFCO has no authority over these types of agencies.

CREDITS

The authors extend their appreciation to those individuals at many agencies that provided planning and financial information and documents used in this report. The contributors are listed individually at the end of this report.

Contra Costa LAFCO Executive Officer, Lou Ann Texeira, provided project direction and review. Credit for archival review and organization undertaking belongs to Lou Ann Texeira and her team, including LAFCO clerk Kate Sibley, County GIS staff Chris Howard, and consultant Alexander Hebert-Brown. Heather Kennedy and Chris Howard of the Contra Costa County Information Technology Department prepared maps and conducted GIS analysis.

This report was prepared by Burr Consulting. Alexander Hebert-Brown served as principal author. Jennifer Stephenson assisted with research and drafting of the report.

1. EXECUTIVE SUMMARY

This report is a countywide Municipal Service Review (MSR) of local agencies providing park and recreation and cemetery services, prepared for the Contra Costa Local Agency Formation Commission (LAFCO). An MSR is a State-required comprehensive study of services within a designated geographic area, in this case, Contra Costa County. The MSR requirement is codified in the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 (Government Code Section 56000 et seq.). Once MSR findings are adopted, the Commission will update the spheres of influence (SOIs) of the agencies. This report identifies and analyzes SOI options for the Commission's consideration.

SERVICE PROVIDERS

This report focuses on those special districts that provide park and recreation and cemetery services in Contra Costa County and are under LAFCO jurisdiction, as shown in Table 1-1.

Table 1-1: Local Agencies Reviewed

			Park and Rec Services			Other Services					
Special District	**Location**	**Administered By**	**Park Maintenace**	**Recreation**	**Rec/Comm. Center**	**Landscaping**	**Road Maintenance**	**Drainage**	**Street Lights**	**Law Enforcement**	**Cemetery**
ARPD	Bay Point	District	□	○	□						
GVRPD	Town of Danville	District		Δ	○						
PHRPD	Pleasant Hill	District	□	□	□						
RWPRPD	Rollingwood	District		○	□						
CSA M-16	Clyde	County	□	×		Δ					
CSA M-17	Tara Hills/Montalvin Manor	County	○	○	○						
CSA M-29	City of San Ramon	City of San Ramon	□		□	□	□	□	□	□	
CSA M-30	Alamo	Town of Danville	□		□	□	□		○	○	
CSA R-4	Town of Moraga	Town of Moraga	□	○	□						
CSA R-7 (Zone A)	Alamo	County	Δ	□	×						
CSA R-9	El Sobrante	County	□	×	×						
CSA R-10	Rodeo and Rodeo Creek Trail	County	○	○	○						
ALCD	Central County	District									□
BBKUCD	East County	District									□

□ *service provided directly by agency*
Δ *service provided by agency staff and by contract with another provider*
○ *service provided by contract with another service provider*
× *formation purpose not presently exercised*

This report is the sole MSR in this cycle for each of the 12 districts providing park and recreation services, and the two districts providing cemetery services.[1] LAFCO will update these agencies' spheres of influence (SOIs) at the completion of this review.[2]

PARK AND RECREATION FINDINGS

Service Levels

Pleasant Hill Recreation and Park District (RPD) has the highest level of recreation service demand, followed by Rollingwood-Wilart Park RPD and Ambrose RPD. Recreation demand is much lower within the County Service Areas (CSAs) than the RPDs. Similarly, those districts with a higher demand for recreation programming generally had higher recreation expenditures per capita. Correspondingly, PHRPD has the highest level of recreation expenditures per capita.

Most of the districts fail to meet park acreage standards established by the land use authorities in the area. Of the 10 special districts providing park maintenance services, nine do not meet their established Level of Service (LOS) standard, and have existing and future park acreage needs. Many of the CSAs (M-17, R-7, R-9, and R-10) are built-out and lack available land for new park facilities.[3]

Park maintenance service levels, as determined by maintenance expenditures per acre, were highest in CSA R-7, ARPD and CSA M-29. PHRPD and CSA M-17 each provide park maintenance at approximately the median level. CSA R-4 provides maintenance below the median, and CSA M-30 and CSA R-10 provide the lowest levels of park maintenance expenditures per acre.

Policy Options

- All districts, particularly those with a lack of available land for additional park facilities, should capitalize on facility sharing and open facilities to the public that are not presently available for general use, including establishing or increasing collaboration with the local school district, exploring community resources and other options for indoor offsite locations for recreation programs and activities, and partnering with non-profits such as the YMCA.

Management and Accountability

Accountability to constituents within the park and recreation CSAs is constrained due to a lack of representation on advisory committees or the lack of a citizens advisory committee altogether. Of the CSAs reviewed, only M-16 and R-7A have some form of advisory committee or council to act as a sounding board for the community to voice local preferences to the County or managing municipality. Residents of CSAs M-17 and M-30 lack representation on any kind of advisory committee. The advisory committee for CSA R-9 suffers from a lack of public interest with several

[1] City park and recreation services and programs were generally covered in the Central, East and West Sub-Regional MSRs prepared in 2008 and 2009.

[2] The SOI for Green Valley Recreation and Park District (GVRPD) was updated in 2008 and 2009, in conjunction with a separate MSR adopted by the Commission, and thus will not be updated following this MSR cycle.

[3] Land use authorities may establish high LOS standards in order to maximize development impact fees received from developers.

extended vacancies. Residents within the incorporated area of CSAs M-29 and R-4 are eligible to sit on the municipal government's park and recreation commissions; however, residents in the unincorporated areas are unable to be a member of these commissions.

RWPRPD has failed to prepare an audited financial statement in the last 10 years, does not perform long-term capital planning, has been operating with a three-member board since 1999 due to lack of public interest in serving on the board, and demonstrated limited accountability in its disclosure of information and cooperation with LAFCO.

With regard to outreach, there is generally a lack of websites promoting the availability of recreation programming within the CSAs and RWPRPD.

Policy Options

- A possible opportunity for improved constituent interest and involvement may be to combine the advisory committees of CSAs R-9 (El Sobrante) and R-10 (Rodeo) with the municipal advisory councils (MAC) for the areas, as was recently done for CSA R-7 (Zone A) in Alamo. The MACs are regulated by adopted County policies, with requirements for meetings, training, operating procedures, and annual reports to the Supervisors, and would improve local accountability.

- In order to enhance accountability, the City of San Ramon, the Town of Moraga and the Town of Danville should consider allowing CSA residents in the unincorporated areas that are financing municipal park services to sit on the park and recreation commissions, and the County Board of Supervisors should consider reinstating the CSA M-17 advisory committee. Also, because the homes in CSA M-30 are located in the unincorporated area of Contra Costa County, the residents of CSA M-30 can attend and apply to serve on the Alamo MAC to address representation issues.

- Due to a lack of accountability and community involvement, dissolution of RWPRPD is an option. CSA R-9, located adjacent to the boundaries of RWPRPD, would be the logical successor agency; however, the CSA has also suffered from a lack of constituent interest in recent years, and has a lack of existing park and recreation capacity. A governance alternative affecting both agencies would be to consolidate RWPRPD with CSA R-9, and then combine the CSA R-9 advisory committee with the El Sobrante Municipal Advisory Council.

- RWPRPD and those CSAs with recreation programming should create websites with information regarding available classes and locations to promote the use of these services.

<u>Financing</u>

The financial ability of agencies to provide park and recreation services varies significantly. Every district, with the exception of CSAs R-9 and R-10, receives some funding via property taxes and/or assessments. CSA R-9 has no regular financing source and assessments were denied twice by voters.

PHRPD, and CSAs M-30 and R-4 reported that finances were generally adequate to provide services. ARPD and RWPRPD reported that the districts operate under severe budgeting

constraints. The County-administered CSAs reported that financing levels were inadequate to provide satisfactory services, and the City of San Ramon reported that the present financing level within CSA M-29 was not adequate.

Policy Options

- Given that service levels are closely linked to funding levels, districts should be encouraged to 1) keep up-to-date fees for services and update development impact fees, 2) maximize available funding from the East Bay RPD Measure WW funds, and 3) search for regular revenue sources.

- As CSA R-9 has no regular source of financing, lacks public interest to fill advisory committee positions, and provides minimal services at a less than adequate service level, dissolution of the CSA is also an option. Since 1974, the CSA has failed to find additional fixed funding sources other than developer fees to finance services. The County reported that it is amenable to exploring options, including dissolution of this CSA, if a better and more efficient funding source is available to provide the same services to the public.

Service Duplication and Boundary Overlap

CSA R-7 boundaries overlap those of CSA M-30, creating a duplication of services. Residents within CSA M-30 pay a benefit assessment to the County, which is transferred to the Town of Danville for park and recreation services, and also pay property taxes to CSA R-7 for park and recreation services.

The boundaries of ARPD include portions of the City of Pittsburg, but also contain a large "hole," where territory was detached from ARPD upon annexation to the City. In areas where ARPD boundaries overlap City boundaries there would appear to be a duplication of services, as both ARPD and the City of Pittsburg provide local park and recreation services.[4]

Policy Options

- In order to address the CSA R-7/M-30 overlap, one governance alternative is to detach the territory in CSA M-30 from CSA R-7. Another option is to consolidate the two CSAs into a single CSA. Such a CSA would require a zone for the area formerly within CSA M-30, to maintain the financing mechanism for enhanced services by the Town of Danville per the agreement between the Town and the County.

- A long-term governance alternative may be the establishment of ARPD as a subsidiary district of the City of Pittsburg, if the City annexes the Bay Point area. The entire ARPD boundary is within the City of Pittsburg's planning area and SOI, and the City previously indicated a desire to eventually annex the community of Bay Point.

[4] With the exception of the Ambrose Park and adjacent areas. Ambrose Park was annexed to the City of Pittsburg in 2008, with the intention of overlapping ARPD, so that both agencies could jointly plan and fund park improvements.

CEMETERY FINDINGS

Service Levels

Both ALCD and BBKUCD appear to have sufficient capacity for the next 15-20 years, even accounting for population growth. Within ALCD, the Alamo Cemetery has reached capacity for in-ground burials, but in-ground plots are still available at the Lafayette Cemetery. ALCD has expanded cremation niche capacity at both facilities in recent years. Within BBKUCD, the Union Cemetery has capacity for at least 31 years of single-body in-ground burials, and 18 years of niche placements.

Policy Options

- Both districts have taken a proactive approach to expanding capacity by adding cremation niches at the cemetery facilities. Because niches can be constructed vertically along walls and walkways, and because a single niche can accommodate up to two urns, much higher densities can be achieved with cremation interments than traditional full body in-ground burials.

Management and Accountability

Both ALCD and BBKUCD generally exhibit the characteristics of well-managed local government agencies; however, significant planning needs face both districts.

It is important that both districts plan for long-term facility needs, including acquiring and developing new cemetery facilities. In fairness to current and future taxpayers, public cemetery districts should continue providing cemetery services by obtaining and developing more land as existing facilities reach capacity. ALCD reported that adding niches is the only method of increasing capacity currently available to the district, due to the high cost of land within the district, and limited finances.

Policy Options

- Both districts should create and maintain a written capital improvement plan for cemetery facility improvements and expansion. A written multi-year capital improvement planning document could help the districts better forecast and plan capital needs, and would improve accountability. Long-term planning is particularly important for ALCD given the constraints faced by the District.

Financing

For both districts, property taxes consist of approximately 65 percent of total revenues. BBKUCD's financial standing has improved in recent years due to the increase in property tax revenue from residential development in eastern Contra Costa County.

Both ALCD and BBKUCD charge endowment fees for burial plots and niches, as required by Health and Safety Code §9065; however, both ALCD and BBKUCD reported that their endowment care fees may be too low to cover long-term maintenance costs of existing plots. Neither district has conducted a formal review of the adequacy of the endowment care fund to determine if the fund balance will be enough to provide perpetual care to the cemetery facilities once they have reached

capacity. LAFCO may wish to correspond with the Legislature regarding the adequacy of the minimum required endowment fees. Cemetery districts charging only the minimum endowment fee may not be able to provide adequate long-term care of facilities.

ALCD appears to lack the financial ability to continue expanding facilities, and may be unable to serve current and future taxpayers.

Policy Options

- It is recommended that both districts conduct a formal review of the adequacy of the endowment care fund to determine if the fund balance will be enough to provide perpetual care to the cemetery facilities once they have reached capacity.

Boundary Inconsistencies

ALCD boundaries include only portions of various incorporated areas, including the City of Walnut Creek, the City of Lafayette, the Town of Danville, and the City of San Ramon. The District was formed before incorporation of these cities and towns, and corresponding annexations to ALCD were not processed along with incorporation and/or annexations to the cities. ALCD reported that determining residency of prospective customers can be difficult and time-consuming, due to the outdated and illogical boundaries of the district.

BBKUCD boundaries include only the eastern portion of the City of Oakley (east of Sellers Avenue), and a small portion of the City of Antioch. These areas have always been within BBKUCD; however, they were not detached from the District following annexation to the City (in the case of Oakley) or incorporation (in the case of Antioch).

Policy Options

- One option to make cemetery district boundaries more logical would be to align them with the boundaries of the incorporated areas within the districts. However, annexation of these incorporated areas poses a potential challenge due to property tax considerations. In order for the District to receive property tax from the annexed areas, a property tax transfer agreement would have to be reached between the District and other local agencies. If a property tax transfer agreement could not be reached, the cemetery districts would not receive property tax revenue from the annexed areas, and would likely not be able to extend the same fees for service to these areas. Alternatively, the District may determine that it does not have the short-term capacity to provide cemetery services to a significantly larger area, or a sufficient endowment fund balance to fund cemetery maintenance activities.

SOI UPDATES

This report identifies alternatives for LAFCO to consider as it updates the spheres of influence (SOIs) of the 11 recreation and park districts and two cemetery districts, and offers preliminary recommendations. An SOI is a LAFCO-approved plan that designates an agency's probable future boundary and service area. The SOI essentially defines where and what types of government reorganizations, such as annexation, detachment, dissolution or consolidation, may be initiated. The governing bodies of local agencies and voters may initiate reorganizations so long as they are consistent with the SOIs. An SOI change neither initiates nor approves a government reorganization. If and when a government reorganization is initiated, there are procedural steps required by law, including a protest hearing and/or election by which voters may choose to approve or disapprove a reorganization. The consultants' SOI recommendations are shown in Table 1-2.

Table 1-2: SOI Update Recommendations

Agency	Recommended SOI
ARPD	Reduce SOI to match the existing and future ARPD parks and recreation service area (the community of Bay Point north of SR 4, Ambrose Park and areas outside of the countywide urban limit line).
PHRPD	Expand SOI to include the City of Pleasant Hill boundaries and SOI, and reduce SOI to exclude the portions of the cities of Lafayette and Walnut Creek that are not served by PHRPD parks.
RWPRPD	Provisional zero SOI to encourage accountability, with possible future consolidation with CSA R-9 or dissolution.
CSA M-16	Retain existing coterminous SOI.
CSA M-17	Retain existing coterminous SOI.
CSA R-7	SOI reduction to exclude CSA M-30 boundary.
CSA R-9	Retain existing coterminous SOI on a provisional basis.
CSA R-10	Retain existing coterminous SOI.
CSA M-29	Retain existing coterminous SOI.
CSA M-30	Retain existing coterminous SOI.
CSA R-4	Reduce SOI to exclude vacant unincorporated areas, and expand SOI to include entire Town of Moraga boundary.
ALCD	SOI expansion to include incorporated and unincorporated areas that extend outside of the District, pending property tax transfer and fee study materials, and capacity study submitted to LAFCO by District.
BBKUCD	SOI expansion west of Sellers Avenue, to include the entire City of Oakley, and SOI reduction to exclude the City of Antioch, pending property tax transfer and fee study materials, and capacity study submitted to LAFCO by District.

2. LAFCO AND MUNICIPAL SERVICE REVIEWS

This report is prepared pursuant to legislation enacted in 2000 that requires LAFCO to conduct a comprehensive review of municipal service delivery and update the spheres of influence (SOIs) of all agencies under LAFCO's jurisdiction. This chapter provides an overview of LAFCO's history, powers and responsibilities. It discusses the origins and legal requirements for preparation of the municipal service review (MSR). Finally, the chapter reviews the process for MSR review, MSR approval and SOI updates.

LAFCO OVERVIEW

After World War II, California experienced dramatic growth in population and economic development. With this boom came a demand for housing, jobs and public services. To accommodate this demand, many new local government agencies were formed, often with little forethought as to the ultimate governance structures in a given region, and existing agencies often competed for expansion areas. The lack of coordination and adequate planning led to a multitude of overlapping, inefficient jurisdictional and service boundaries, and the premature conversion of California's agricultural and open-space lands.

Recognizing this problem, in 1959, Governor Edmund G. Brown, Sr. appointed the Commission on Metropolitan Area Problems. The Commission's charge was to study and make recommendations on the "misuse of land resources" and the growing complexity of local governmental jurisdictions. The Commission's recommendations on local governmental reorganization were introduced in the Legislature in 1963, resulting in the creation of a Local Agency Formation Commission, or LAFCO.

The Contra Costa LAFCO was formed as a countywide agency to discourage urban sprawl and encourage the orderly formation and development of local government agencies. LAFCO is responsible for coordinating logical and timely changes in local governmental boundaries, including annexations and detachments of territory, incorporations of cities, formations of special districts, and consolidations, mergers and dissolutions of districts, as well as reviewing ways to reorganize, simplify, and streamline governmental structure. The Commission's efforts are focused on ensuring that services are provided efficiently and economically while agricultural and open-space lands are protected. To better inform itself and the community as it seeks to exercise its charge, LAFCO conducts service reviews to evaluate the provision of municipal services within the County.

LAFCO regulates, through approval, denial, conditions and modification, boundary changes proposed by public agencies or individuals. It also regulates the extension of public services by cities and special districts outside their boundaries. LAFCO is empowered to initiate updates to the SOIs and proposals involving the dissolution or consolidation of special districts, mergers, establishment of subsidiary districts, formation of a new district or districts, and any reorganization including such actions. Otherwise, LAFCO actions must originate as petitions or resolutions from affected voters, landowners, cities or districts.

Contra Costa LAFCO consists of seven regular members: two members from the Contra Costa County Board of Supervisors, two city council members, two independent special district members, and one public member who is appointed by the other members of the Commission. There is an alternate in each category. All Commissioners are appointed to four-year terms. The Commission members are shown in Table 2-1.

Table 2-1: Commission Members, 2010

Appointing Agency	Members	Alternate Members
Two members from the Board of Supervisors appointed by the Board of Supervisors.	Federal Glover Gayle Uilkema	Mary N. Piepho
Two members representing the cities in the County. Must be a city officer and appointed by the City Selection Committee.	Helen Allen, *City of Concord* Rob Schroder, *City of Martinez*	Don Tatzin *City of Lafayette*
Two members representing the independent special districts in the County. Must be a district governing body member and appointed by the independent special district selection committee.	Dwight Meadows, *Contra Costa Resource Conservation Dist.* David A. Piepho, *Discovery Bay Community Services Dist.*	George H. Schmidt, *West County Wastewater Dist.*
One member from the general public appointed by the other six Commissioners.	Martin McNair	Sharon Burke

MUNICIPAL SERVICE REVIEW ORIGINS

The MSR requirement was enacted by the Legislature months after the release of two studies recommending that LAFCOs conduct reviews of local agencies. The "Little Hoover Commission" focused on the need for oversight and consolidation of special districts, whereas the "Commission on Local Governance for the 21st Century" focused on the need for regional planning to ensure adequate and efficient local governmental services as the California population continues to grow.

LITTLE HOOVER COMMISSION

In May 2000, the Little Hoover Commission released a report entitled *Special Districts: Relics of the Past or Resources for the Future?* This report focused on governance and financial challenges among independent special districts, and the barriers to LAFCO's pursuit of district consolidation and dissolution. The report raised the concern that "the underlying patchwork of special district governments has become unnecessarily redundant, inefficient and unaccountable."[5]

In particular, the report raised concern about a lack of visibility and accountability among some independent special districts. The report indicated that many special districts hold excessive reserve funds and some receive questionable property tax revenue. The report expressed concern about the lack of financial oversight of the districts. It asserted that financial reporting by special districts is inadequate, that districts are not required to submit financial information to local elected officials, and concluded that district financial information is "largely meaningless as a tool to evaluate the

[5] Little Hoover Commission, 2000, p. 12.

effectiveness and efficiency of services provided by districts, or to make comparisons with neighboring districts or services provided through a city or county."[6]

The report questioned the accountability and relevance of certain special districts with uncontested elections and without adequate notice of public meetings. In addition to concerns about the accountability and visibility of special districts, the report raised concerns about special districts with outdated boundaries and outdated missions. The report questioned the public benefit provided by health care districts that have sold, leased or closed their hospitals, and asserted that LAFCOs consistently fail to examine whether they should be eliminated. The report pointed to service improvements and cost reductions associated with special district consolidations, but asserted that LAFCOs have generally failed to pursue special district reorganizations.

The report called on the Legislature to increase the oversight of special districts by mandating that LAFCOs identify service duplications and study reorganization alternatives when service duplications are identified, when a district appears insolvent, when district reserves are excessive, when rate inequities surface, when a district's mission changes, when a new city incorporates and when service levels are unsatisfactory. To accomplish this, the report recommended that the State strengthen the independence and funding of LAFCOs, require districts to report to their respective LAFCO, and require LAFCOs to study service duplications.

COMMISSION ON LOCAL GOVERNANCE FOR THE 21ST CENTURY

The Legislature formed the Commission on Local Governance for the 21st Century ("21st Century Commission") in 1997 to review statutes on the policies, criteria, procedures and precedents for city, county and special district boundary changes. After conducting extensive research and holding 25 days of public hearings throughout the State at which it heard from over 160 organizations and individuals, the 21st Century Commission released its final report, *Growth Within Bounds: Planning California Governance for the 21st Century*, in January 2000.[7] The report examines the way that government is organized and operates and establishes a vision of how the State will grow by "making better use of the often invisible LAFCOs in each county."

The report points to the expectation that California's population will double over the first four decades of the 21st Century, and raises concern that our government institutions were designed when our population was much smaller and our society was less complex. The report warns that without a strategy open spaces will be swallowed up, expensive freeway extensions will be needed, job centers will become farther removed from housing, and this will lead to longer commutes, increased pollution and more stressful lives. *Growth Within Bounds* acknowledges that local governments face unprecedented challenges in their ability to finance service delivery since voters cut property tax revenues in 1978 and the Legislature shifted property tax revenues from local government to schools in 1993. The report asserts that these financial strains have created governmental entrepreneurism in which agencies compete for sales tax revenue and market share.

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[6] Little Hoover Commission, 2000, p. 24.

[7] The Commission on Local Governance for the 21st Century ceased to exist on July 1, 2000, pursuant to a statutory sunset provision.

The 21st Century Commission recommended that effective, efficient and easily understandable government be encouraged. In accomplishing this, the 21st Century Commission recommended consolidation of small, inefficient or overlapping providers, transparency of municipal service delivery to the people, and accountability of municipal service providers. The sheer number of special districts, the report asserts, "has provoked controversy, including several legislative attempts to initiate district consolidations,"[8] but cautions LAFCOs that decisions to consolidate districts should focus on the adequacy of services, not on the number of districts.

Growth Within Bounds stated that LAFCOs cannot achieve their fundamental purposes without a comprehensive knowledge of the services available within its county, the current efficiency of providing service within various areas of the county, future needs for each service, and expansion capacity of each service provider. Comprehensive knowledge of water and sanitary providers, the report argued, would promote consolidations of water and sanitary districts, reduce water costs and promote a more comprehensive approach to the use of water resources. Further, the report asserted that many LAFCOs lack such knowledge and should be required to conduct such a review to ensure that municipal services are logically extended to meet California's future growth and development.

MSRs would require LAFCO to look broadly at all agencies within a geographic region that provide a particular municipal service and to examine consolidation or reorganization of service providers. The 21st Century Commission recommended that the review include water, wastewater, and other municipal services that LAFCO judges to be important to future growth. The Commission recommended that the service review be followed by consolidation studies and be performed in conjunction with updates of SOIs. The recommendation was that service reviews be designed to make nine determinations, each of which was incorporated verbatim in the subsequently adopted legislation. The legislature since consolidated the determinations into six required findings.

MUNICIPAL SERVICE REVIEW LEGISLATION

The Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 requires LAFCO review and update SOIs not less than every five years and to review municipal services before updating SOIs. The requirement for service reviews arises from the identified need for a more coordinated and efficient public service structure to support California's anticipated growth. The service review provides LAFCO with a tool to study existing and future public service conditions comprehensively and to evaluate organizational options for accommodating growth, preventing urban sprawl, and ensuring that critical services are provided efficiently.

Effective January 1, 2008, Government Code §56430 requires LAFCO to conduct a review of municipal services provided in the county by region, sub-region or other designated geographic area, as appropriate, for the service or services to be reviewed, and prepare a written statement of determination with respect to each of the following topics:

1) Growth and population projections for the affected area;

[8] Commission on Local Governance for the 21st Century, 2000, p. 70.

2) Present and planned capacity of public facilities and adequacy of public services, including infrastructure needs or deficiencies;

3) Financial ability of agencies to provide services;

4) Status of, and opportunities for shared facilities;

5) Accountability for community service needs, including governmental structure and operational efficiencies; and

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

SPHERES OF INFLUENCE

An SOI is a LAFCO-approved plan that designates an agency's probable future boundary and service area. Spheres are planning tools used to provide guidance for individual boundary change proposals and are intended to encourage efficient provision of organized community services, discourage urban sprawl and premature conversion of agricultural and open space lands, and prevent overlapping jurisdictions and duplication of services. Every determination made by a commission must be consistent with the SOIs of local agencies affected by that determination;[9] for example, territory may not be annexed to a city or district unless it is within that agency's sphere. SOIs should discourage duplication of services by local governmental agencies, guide the Commission's consideration of individual proposals for changes of organization, and identify the need for specific reorganization studies, and provide the basis for recommendations to particular agencies for government reorganizations.

Contra Costa LAFCO policies are that LAFCO discourages inclusion of land in an agency's SOI if a need for services provided by that agency within a 5-10 year period cannot be demonstrated. SOIs generally will not be amended concurrently with an action on the related change of organization or reorganization. A change of organization or reorganization will not be approved solely because an area falls within the SOI of any agency. In other words, the SOI essentially defines where and what types of government reorganizations (e.g., annexation, detachment, dissolution and consolidation) may be initiated. If and when a government reorganization is initiated, there are a number of procedural steps that must be conducted for a reorganization to be approved. Such steps include more in-depth analysis, LAFCO consideration at a noticed public hearing, and processes by which affected agencies and/or residents may voice their approval or disapproval.

The Cortese-Knox-Hertzberg Act requires LAFCO to develop and determine the SOI of each local governmental agency within the county and to review and update the SOI every five years. LAFCOs are empowered to adopt, update and amend the SOI. They may do so with or without an application and any interested person may submit an application proposing an SOI amendment.

LAFCO may recommend government reorganizations to particular agencies in the county, using the SOIs as the basis for those recommendations. Based on review of the guidelines and practices

[9] Government Code §56375.5.

of Contra Costa LAFCO as well as other LAFCOs in the State, various conceptual approaches have been identified from which to choose in designating an SOI:

1) Coterminous Sphere: The sphere for a city or special district that is the same as its existing boundaries.

2) Annexable Sphere: A sphere larger than the agency's boundaries identifies areas the agency is expected to annex. The annexable area is outside its boundaries and inside the sphere.

3) Detachable Sphere: A sphere that is smaller than the agency's boundaries identifies areas the agency is expected to detach. The detachable area is the area within the agency bounds but not within its sphere.

4) Zero Sphere: A zero sphere indicates the affected agency's public service functions should be reassigned to another agency and the agency should be dissolved or combined with one or more other agencies.

5) Consolidated Sphere: A consolidated sphere includes two or more local agencies and indicates the agencies should be consolidated into one agency.

6) Limited Service Sphere: A limited service sphere is the territory included within the SOI of a multi-service provider agency that is also within the boundary of a limited purpose district which provides the same service (e.g., fire protection), but not all needed services.

7) Sphere Planning Area: LAFCO may choose to designate a sphere planning area to signal that it anticipates expanding an agency's SOI in the future to include territory not yet within its official SOI.

8) Provisional Sphere: LAFCO may designate a provisional sphere that automatically sunsets if certain conditions occur.

LAFCO is required to establish SOIs for all local agencies and enact policies to promote the logical and orderly development of areas within the SOIs. Furthermore, LAFCO must update those SOIs every five years. In updating the SOI, LAFCO is required to conduct a municipal service review (MSR) and adopt related determinations. In addition, in adopting or amending an SOI, LAFCO must make the following determinations:

- Present and planned land uses in the area, including agricultural and open-space lands;

- Present and probable need for public facilities and services in the area;

- Present capacity of public facilities and adequacy of public service that the agency provides or is authorized to provide; and

- Existence of any social or economic communities of interest in the area if the Commission determines these are relevant to the agency.

MSR AND SOI UPDATE PROCESS

The MSR process does not require LAFCO to initiate changes of organization based on service review findings, only that LAFCO identify potential government structure options. However, LAFCO, other local agencies, and the public may subsequently use the determinations to analyze prospective changes of organization or reorganization or to establish or amend SOIs. LAFCO may act with respect to a recommended change of organization or reorganization on its own initiative, at the request of any agency, or in response to a petition.

MSRs are exempt from California Environmental Quality Act (CEQA) pursuant to §15262 (feasibility or planning studies) or §15306 (information collection) of the CEQA Guidelines. LAFCO's actions to adopt MSR determinations are not considered "projects" subject to CEQA.

Once LAFCO has adopted the MSR determinations, it must update the SOIs for 13 reclamation districts. This report identifies preliminary SOI policy alternatives and recommends SOI options for each agency. Development of actual SOI updates will involve additional steps, including development of recommendations by LAFCO staff, opportunity for public input at a LAFCO public hearing, and consideration and changes made by Commissioners. A CEQA determination will then be made on a case-by-case basis once the proposed project characteristics are clearly identified.

The CKH Act stipulates several procedural requirements in updating SOIs. It requires that special districts file written statements on the class of services provided and that LAFCO clearly establish the location, nature and extent of services provided by special districts. Accordingly, each local agency's class of services provided is documented in this 2009 MSR. The MSR described the nature, location, and extent of functions or classes of services provided by existing districts, which is a procedural requirement for LAFCO to complete when updating SOIs.

LAFCO must notify affected agencies 21 days before holding a public hearing to consider the SOI and may not update the SOI until after that hearing. The LAFCO Executive Officer must issue a report including recommendations on the SOI amendments and updates under consideration at least five days before the public hearing.

3. PARKS & RECREATION SERVICES

This section provides an overview of the special districts providing park and recreation services in Contra Costa County, including how these services are provided, as well as growth and population projections, current and future service needs, infrastructure needs, service adequacy, and financing. The focus of the chapter is on park and recreation service providers under Contra Costa LAFCO jurisdiction; however, other providers are listed in the provider overview section for completeness. Government structure options are identified for local agencies under Contra Costa LAFCO jurisdiction.

PROVIDER OVERVIEW

This section provides an overview of the special districts in Contra Costa County that provide park and recreation services.[10]

Table 3-1: Park and Recreation Service Configuration

Special District	Park Maintenace	Recreation	Rec/Comm. Center
ARPD	□	○	□
GVRPD		Δ	○
PHRPD	□	□	□
RWPRPD		○	□
CSA M-16	□	×	
CSA M-17	○	○	○
CSA M-29	□		□
CSA M-30	□		□
CSA R-4	□	○	□
CSA R-7 (Zone A)	Δ	□	×
CSA R-9	□	×	×
CSA R-10	○	○	○

□ *service provided directly by agency*
Δ *service provided by agency staff and by contract with another provider*
○ *service provided by contract with another service provider*
× *formation purpose not presently exercised*

RECREATION AND PARK DISTRICTS

Ambrose Recreation and Park District

Ambrose Recreation and Park District (ARPD) provides park maintenance and recreation services to the unincorporated community of Bay Point and to a portion of the western City of Pittsburg area. Maintenance of park and recreation facilities is performed directly by the District, while recreation programming is provided by independent contractors.

Green Valley Recreation and Park District

Green Valley Recreation and Park District (GVRPD) provides maintenance and recreation services to a swimming pool in the Town of Danville. Maintenance of the pool facilities and grounds is performed by independent contractors. Recreation programs at the pool are provided by part-time agency staff and by independent contractors.

Pleasant Hill Recreation and Park District

Pleasant Hill Recreation and Park District (PHRPD)

[10] City park and recreation services and programs were generally covered in the Central, East and West Sub-Regional MSRs prepared in 2008 and 2009.

provides recreation and park services to the City of Pleasant Hill. Also located within the District is a portion of the City of Lafayette, and a small portion of the City of Walnut Creek and the unincorporated community of Walden/Contra Costa Centre. All park maintenance and recreation services are provided directly by the District.

Rollingwood-Wilart Park Recreation and Park District

Rollingwood-Wilart Park Recreation and Park District (RWPRPD) operates and maintains a recreation center for recreation programs and community events in the unincorporated community of Rollingwood. The District provides maintenance and operations services directly. Recreation classes are provided by independent contractors.

COUNTY SERVICE AREAS (CSAS)

County Service Area M-16

CSA M-16 provides landscaping and park maintenance services in the unincorporated community of Clyde. Park maintenance services are provided by the County General Services Department. The CSA does not provide recreation programming.

County Service Area M-17

CSA M-17 provides park and recreation facility maintenance and recreation programming for the unincorporated communities of Tara Hills and Montalvin Manor. All services are provided by private contractors.

County Service Area M-29

CSA M-29 provides financing for park and recreation facility maintenance in the Dougherty Valley area, a portion of which lies within the boundaries of the City of San Ramon. The CSA does not provide recreation programming. Maintenance of city-owned facilities is provided by the City of San Ramon. Other city services that are eligible to receive CSA M-29 funds include internal road maintenance, street landscaping, open space maintenance, flood control, police services, and community facilities maintenance.

County Service Area M-30

CSA M-30 provides financing for extended facilities and services in the unincorporated community of Alamo Springs through the Town of Danville and CSA L-100. A portion of CSA M-30 funds are transferred to CSA L-100 for street light services. Town services that are eligible to receive CSA M-30 funds include parks and recreation, law enforcement, street maintenance, and landscaping. There are no park facilities within the CSA; however, the Town uses CSA funds to provide park and recreation services within town limits for CSA resident use. The Danville Street Lighting and Landscape Assessment District 1983-1, a subsidiary district to the Town, provides maintenance for parks.

County Service Area R-4

CSA R-4 provides financing for augmented operation and maintenance of park and recreation facilities and recreation programming in the incorporated Town of Moraga, for the unincorporated area to the southeast of the Town. The CSA provides park and recreation services through the Town's Park and Recreation Department and Public Works Department, in addition to contractors, non-town organizations, and in conjunction with East Bay Regional Park District and the Lamorinda Seniors Program.

County Service Area R-7 (Zone A)

CSA R-7 (Zone A) provides park and recreation facility operation and maintenance and recreation programming in the unincorporated community of Alamo. Park maintenance services within the CSA are provided in conjunction with multiple other service providers, including the County, the Town of Danville, and San Ramon Valley Unified School District. Recreation programming is provided directly by the CSA.

County Service Area R-9

CSA R-9 provides park facility operation and maintenance in the unincorporated community of El Sobrante. The CSA primarily provides funding for the operation of the Children's Reading Garden at the El Sobrante Library, in cooperation with the library, community members and the District 1 Supervisor's office.

County Service Area R-10

CSA R-10 provides operation and maintenance of park and recreation facilities in the unincorporated community of Rodeo. Community Center coordination and recreation programming provided by the CSA are supplied by contract; maintenance of the community center building is provided by the County.

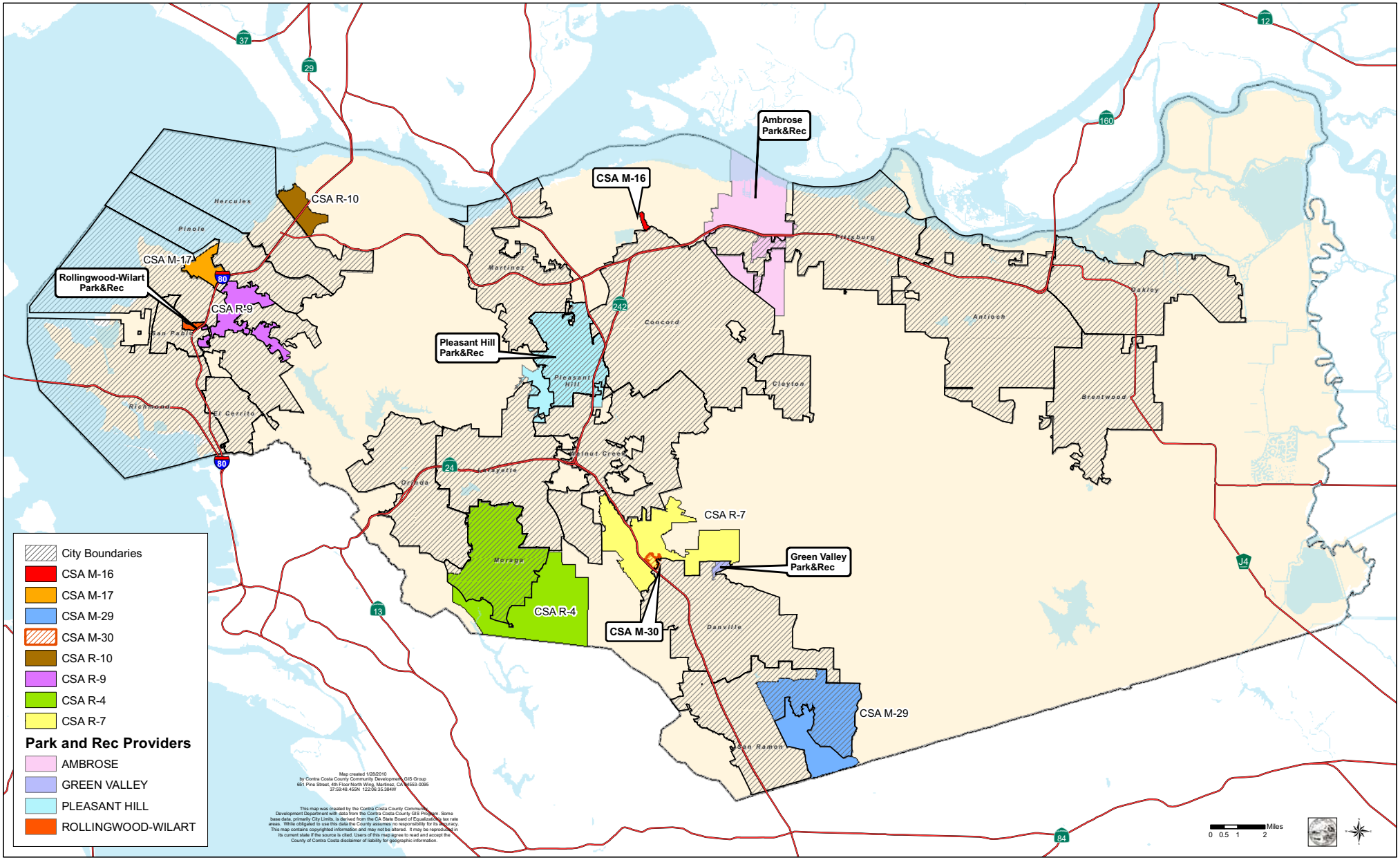
REGIONAL PARK DISTRICTS

East Bay Regional Park District

The East Bay Regional Park District (EBRPD) provides regional park and recreation services, and operates golf courses. Facilities and properties are located throughout Alameda and Contra Costa counties. Alameda is the principal LAFCO. Alameda LAFCO adopted park and recreation MSR determinations covering EBRPD in 2006. EBRPD is included in this MSR for comprehensive park and recreation coverage in Contra Costa County.

Map 3-1

Special District Park & Recreation Service Providers



SERVICE DEMAND

This section provides an overview of park and recreation use, including recreation attendance, and a general discussion of factors affecting service demand

Knowledge of how, when and where people use parks is essential in guiding managers in directing staff time, funding and many other decisions. Tracking visitation and program use has advantages in terms of justification of funding, helping managers assess operational success, and in guiding performance improvement; however, most local agencies do not track the number of park visitors, and only PHRPD had precise knowledge of the levels of recreation usage. For agencies that directly provide recreation programming, tracking recreation usage is largely a matter of tabulating signups and payments of recreation fees. However, agencies that provide recreation programming by contract tend to keep fewer records of recreation attendance, because signups and fee payments are often not performed directly by the agency.

RECREATION ATTENDANCE

Table 3-2: Recreation Attendance, FY 08-09

Special District	Facility Rentals	Recreation Attendance	Total Attendance	Recreation Attendance per Resident	Total Attendance per Resident
ARPD	15,480	43,440	58,920	1.9	2.6
PHRPD	57,762	1,337,371	1,395,133	33.4	34.9
RWPRPD	14,480	7,800	22,280	3.3	9.4
CSA M-17	6,300	350	6,650	0.05	0.9
CSA R-4	6,750	10,900	17,650	0.7	1.1
CSA R-7	NA	1,900	1,900	0.1	0.1
CSA R-10	1,440	1,220	2,660	0.2	0.4

Recreation attendance in FY 08-09 for the agencies providing recreation services directly and by contract is shown in Table 3-2. PHRPD tracks the precise number of recreation participants, while all other agencies were able to estimate recreation participation based on average attendance, and the number of times classes or events were held per year.[11]

As shown in Table 3-2, PHRPD has the highest level of recreation service demand. Each resident in PHRPD participated in approximately 33 recreation activities in FY 08-09, or nearly 35 events if facility rentals are included. The next highest levels of recreation service demand are in RWPRPD and ARPD, which both provide recreation services entirely by contract; however, the vast majority of service demand in RWPRPD is for facility rentals, whereas more people participate in recreation classes in ARPD.

[11] CSAs M-16, M-29, M-30 and R-9 were omitted from Table 3-2 because they do not offer recreation services, and GVRPD was not comprehensively reviewed in this MSR.

Recreation demand is much lower within the CSAs. Of the four CSAs providing recreation services, the highest levels of total participation were in CSA R-4 and CSA M-17, with attendance of approximately one activity per resident, while participation in CSA R-7 and CSA R-10 was significantly less than one activity per resident. Demand for facility rentals in CSAs R-10 and M-17 was significantly higher than recreation attendance.

DEMAND DRIVERS

Park demand and usage varies based on a number of factors, including age and income level, but is primarily measured through population growth. As the population continues to grow, park demand will increase (however, the aging of the population is expected to partially offset the growth in residents).

Table 3-3: Projected Population Growth

	2009	2025	% Increase
ARPD	23,000	29,611	29%
GVRPD	1,126	1,200	7%
PHRPD	40,003	46,863	17%
RWPRPD	2,382	2,460	3%
CSA M-16	781	806	3%
CSA M-17	7,521	7,766	3%
CSA M-29	21,598	29,040	34%
CSA M-30	70	120	71%
CSA R-4	16,341	17,699	8%
CSA R-7	13,395	13,880	4%
CSA R-9	12,750	13,165	3%
CSA R-10	6,862	7,136	4%

Sources: Association of Bay Area Governments, California Department of Finance, U.S. Census Bureau, LAFCO estimates and adopted municipal service reviews.

Localized demand changes will primarily depend on development. Areas with the most planned development, and hence, the greatest population increases, are CSA M-29 and ARPD. Population is expected to increase by 34 percent and 29 percent, respectively, for these two areas over the next 15 years, as shown in Table 3-3. High growth is also anticipated within CSA M-30 due to new residential construction on currently vacant lots; however, the overall population level within the CSA will still be relatively low (at approximately 120 residents). CSA R-4, including the Town of Moraga, is anticipated to experience modest growth through 2025, with an annual growth rate of approximately 0.5% percent. Population growth for the majority of special districts providing park and recreation services is expected to be low (approximately 0.2% per year), given that many areas are currently built-out.

SERVICE ADEQUACY

PARK ACREAGE

The amount of park acreage available to district residents is one determinant of service adequacy. Park acres and levels of service (LOS) are displayed in Table 3-4 for each special district providing park maintenance services. Generally LOS standards are established by the land use authority. Agencies in unincorporated Contra Costa County (ARPD, CSAs M-16, M-17, R-7A, R-9 and R-10) have an LOS established by the County General Plan, whereas agencies located within incorporated areas have an LOS established by the respective Town or City General Plan. A majority of the districts reviewed do not meet the established LOS standards, which is common throughout California, as land use authorities have a vested interest in setting high LOS standards to maximize park development impact fees.

Table 3-4: Park Acres and Levels of Service (LOS)

	Maintained Park Acres[1]	Active Acres[2]	Passive Acres[3]	Acreage Standard[4]	Standard Set By	Existing LOS[4]	LOS Met?
ARPD	24.7	20.7	4.0	2.5 acres NP	County General Plan	1.1 acres NP[5] 2.1 acres NP[6]	No
PHRPD	120.1	37.4	232.2	3.0 acres DP	City of Pleasant Hill General Plan	1.6 acres DP	No
CSA M-16	2.4	0.0	2.4	2.5 acres NP	County General Plan	3.0 acres NP	Yes
CSA M-17	11.0	4.0	7.0	2.5 acres NP	County General Plan	1.5 acres NP	No
CSA M-29	145.9	51.7	94.2	4.5 acres NP, 2 acres CP	City of San Ramon General Plan	3.5 acres NP 3 acres CP	No Yes
CSA M-30[7]	196.6	127.6	78.0	5.0 acres	Town of Danville General Plan	4.6 acres	No
CSA R-4	73.9	65.0	258.9	5.0 acres DP	Town of Moraga General Plan	4.5 acres DP	No
CSA R-7[7]	30.3	8.4	21.8	2.5 acres NP	County General Plan	2.3 acres NP	No
CSA R-9	0.1	0.0	0.1	2.5 acres NP	County General Plan	0.0 acres NP[8] 2.3 acres NP[9] 5.1 acres NP[10]	No No Yes
CSA R-10	13.5	11.0	2.5	2.5 acres NP	County General Plan	2.0 acres NP	No

Notes:

(1) Maintained park acres is the total acreage of all parkland regularly maintained by the agency. The sum of active park acres and passive park acres may not necessarily equal maintained park acres if the agency is not regularly maintaining passive parkland such as open space.

(2) Active park acres consists of developed parkland with active recreation programming and sports facilities, such as active ball courts (e.g., basketball or tennis), delineated sports fields (e.g., soccer, baseball, softball), aquatic facilities, gymnasiums, etc.

(3) Passive park acres consists of developed or undeveloped parkland containing trails, walkways, cultural or scenic resources, open fields, picnic tables/shelter, tot lots, etc., but not containing facilities used for active recreation programming.

(4) Per 1,000 residents. DP = Developed Parkland; NP = Neighborhood Parkland; CP = Community Parkland.

(5) Only including parks owned and maintained by ARPD.

(6) Including all District-maintained, County-maintained and City-maintained parks in vicinity of ARPD.

(7) Because Hap Magee Ranch Park serves CSA R-7 and CSA M-30 residents, the full acreage of the park has been included in the calculations for both agencies, despite the fact that maintenance is shared between the County and Town of Danville.

(8) Only including parks maintained by CSA R-9.

(9) Including park and recreation facilities owned and maintained by the Richmond Unified School District within CSA R-9.

(10) Including all CSA-maintained, RUSD-maintained, and City-maintained parks in the vicinity of CSA R-9.

Of the 10 special districts providing park maintenance services, only CSA M-16 meets the LOS standard established for the agency.[12] CSA M-29 meets the LOS standard for community park acreage, but not for neighborhood park acreage. CSA R-9 does not meet LOS standards for park acres within the CSA; however, if park acres in neighboring cities are included (within 0.5 miles of

[12] LOS standards vary by location. Agencies in unincorporated Contra Costa County (ARPD, CSAs M-16, M-17, R-7A, R-9 and R-10) have an LOS established by the County General Plan, whereas agencies located within incorporated areas have an LOS established by the respective Town or City General Plan.

CSA R-9 and likely serving CSA residents), then the parkland LOS is met. All other park maintenance providers do not meet established LOS standards.[13] Additional park acres are needed within most agencies to meet existing LOS standards, and additional acres will be needed to meet standards in the future. However, many of the CSAs are built-out and lack available land for new park facilities.[14] Consequently, there will likely be little improvement to the LOS in M-17, R-7, R-9, and R-10, unless the CSAs can capitalize on facility sharing and open facilities to the public that are not presently available for general use.

Existing and future park acreage needs are discussed further in the Infrastructure Needs and Deficiencies section.

MANAGEMENT

While public sector management standards do vary depending on the size and scope of the organization, there are minimum standards. Well-managed organizations evaluate employees annually, prepare a budget before the beginning of the fiscal year, conduct periodic financial audits to safeguard the public trust, maintain relatively current financial records, and plan and budget for capital needs.

An evaluation of the adequacy of management practices is shown in Table 3-5. The first four indicators are self-explanatory. Capital planning involves the preparation of a multi-year capital improvement plan or comparable planning effort for park and recreation facility capital replacement and, if relevant, expansion.

Table 3-5: Park and Recreation Provider Management Practices

	ARPD	PHRPD	RWPRPD	CSA M-16	CSA M-17	CSA M-29	CSA M-30	CSA R-4	CSA R-7	CSA R-9	CSA R-10
Evaluate employees annually	A	A	X	A	A	A	A	A	A	A	A
Prepare timely budget	A	A	A	A	A	A	A	A	A	A	A
Periodic financial audit	A	A	N	N	N	A	N	N	N	N	N
Current financial records	A	A	A	A	A	A	A	A	A	A	A
Capital planning	A	A	N	I	I	A	A	I	I	I	I

Notes:
A = Practiced adequately
I = Practiced but improvement needed
N = Not practiced
P = In progress
X = Not relevant

All of the districts perform annual employee evaluations on at least an annual basis, with the exception of RWPRPD, due to a lack of regular full-time employees.

With regard to financial records, all of the districts prepare timely annual budgets and maintain current financial records. Of the districts, only ARPD, PHRPD and CSA M-29 (through the City of San Ramon) perform annual financial audits.

[13] GVRPD and RWPRPD were excluded from the table because neither agency provides maintenance to parkland.

[14] The irregular municipal boundaries in west county impact park and recreation service delivery due to the difficulty in developing new parks within pockets of fully-developed unincorporated areas, including El Sobrante, Tara Hills/Montalvin Manor, and Rollingwood.

RWPRPD has not conducted a financial audit in the last 10 years due to financial constraints.[15] A goal of RWPRPD for FY 09-10 is to resume the practice of annual financial audits, and perform back-audits for the last 10 years. The County completes an annual audit for county finances; however, CSA information is not identifiable in these statements. It is recommended that CSA information be reported separately in the County financial statements to improve clarity and transparency.

Capital planning can be accomplished through a wide variety of methods. For the purpose of this report, a formally adopted long-term capital improvement plan that plans for at least five years is considered ideal. ARPD and PHRPD both have adopted five-year capital improvement plans. In addition, both CSA M-29 and CSA M-30 have park facility capital improvements plans adopted by the City of San Ramon and the Town of Danville. The Town of Moraga (CSA R-4) does not prepare a capital improvement plan specific to park and recreation improvements; however, capital improvement needs and costs have been outlined in the Parks Master Plan. While the County has adopted a park facility capital improvement plan, it appears to operate as a complete list of needs rather than a plan of when capital funding will become available for necessary improvements. RWPRPD capital planning efforts are conducted on a year-to-year basis through the annual budget, and capital needs are discussed routinely at meetings.

Of the districts ARPD, PHRPD and CSA M-29 are professionally managed, closely follow best management practices regarding employee management and financial records, and conduct extensive capital improvement planning. The CSAs are professionally managed and generally follow best management practices regarding financial records and planning; however, improvements could be made to the CSA financial auditing and reporting practices to enhance transparency and to the CSA capital improvement plan to better plan for when funding will be available for capital projects. While up-to-date financial records are maintained by the County on behalf of RWPRPD, the District has failed to prepare an audited financial statement in the last 10 years and does not perform long-term capital planning.

Incompatible Activities

A special district of limited powers has only those powers given to it by its enabling statutes or other legislation applicable to that district and cannot exceed those powers. Some enabling statutes specifically address whether members of the governing board can serve as staff, others are silent on this issue. If a district's enabling statutes specifically allow a board member to serve as staff, this practice may be permissible. However, in the absence of specific statutory authorization, this practice may result in a prohibited legal conflict of interest or incompatible activity. A conflict of interest can have serious legal consequences for the board member involved. It is recommended that all districts whose board members serve as staff, consult with their legal counsel regarding the statutory authority for such dual service, and ask legal counsel to evaluate whether any prohibited conflicts of interest, incompatible activities or other legal problems might arise from this arrangement.

[15] The most recently performed audit was conducted by Contra Costa County; however, the District reported that when the price of an audit increased from $1,000 per year to $3,000 per year, the District could no longer afford to have them done. The District is currently trying to find an auditor who will charge between $1,000 and $1,500 per year.

LOCAL ACCOUNTABILITY AND GOVERNANCE

Accountability of a governing body is signified by a combination of several indicators. The indicators chosen here are limited to: 1) constituent interest in the agency's activities as indicated by a board or advisory committee with no or rare vacancies, 2) agency efforts to engage and educate constituents through outreach activities in addition to legally required activities such as agenda posting and public meetings, and 3) transparency of the agency as indicated by cooperation with the MSR process and information disclosure. These measures are shown in Table 3-6.

Table 3-6: Park and Recreation Provider Accountability and Governance Measures

	ARPD	PHRPD	RWPRPD	CSA M-16	CSA M-17	CSA M-29	CSA M-30	CSA R-4	CSA R-7	CSA R-9	CSA R-10
Full board or advisory committee	⊙	⊙	☒	⊙	☒	☐	☒	☐	⊙	☒	☒
Constituent outreach activities	⊙	⊙	☐	☒	☒	⊙	☐	☐	⊙	☐	☐
MSR disclosure	⊙	⊙	☐	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙

Notes:
⊙ = Occurred or adequately practiced
☐ = Partially practiced/Needs improvement
☒ = Did not occur or not practiced

Generally, when there is a lack of constituent interest in an agency's activities, governing bodies are challenged to fill board and advisory committee positions. In the case of the park service providers, four districts have had extended board vacancies or lack an advisory committee altogether. RWPRPD has been operating with a three-member board since 1999 due to lack of public interest in serving on the board; however, the principal act requires that recreation and park districts have at least a five-member board,[16] and there is no provision in the law for decreasing the number of board members to less than five.[17]

CSAs M-17 and M-30 suffer from a lack of representation on any kind of advisory committee altogether. The advisory committee for M-17 was disbanded by the Board of Supervisors in 1990, due to a high degree of tension and acrimony at meetings. There is no advisory committee for CSA M-30, and residents of the CSA are not eligible to sit on the Town of Danville's Parks and Leisure Services Commission—although town park services are receiving financing from the CSA—as they reside in the unincorporated area just outside of the town limit.

The advisory committee for CSA R-9 has four vacant seats out of five committee positions. A possible opportunity for improved constituent interest and involvement may be to combine the advisory committees of CSAs R-9 and R-10 with the municipal advisory council (MAC) for the area as was done for CSA R-7 (Zone A). The MACs are regulated by adopted County policies, with requirements for meetings, training, operating procedures, and annual reports to the Supervisors.

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[16] California Public Resources Code §5784.

[17] California Public Resources Code §5784.2, and interview with Henry Agonia, Executive Director, California Association of Recreation and Park Districts, November 17, 2009.

The boundaries for both CSA M-29 and R-4 partially overlap with the City of San Ramon and Town of Moraga, respectively. Consequently, those residents within the incorporated area of the CSAs are eligible to sit on the municipal government's park and recreation commissions. Those residents in the unincorporated areas are unable to be a member of these commissions. The cities should consider allowing CSA residents in the unincorporated areas that are financing municipal park services to sit on the park and recreation commissions in order to enhance accountability.

ARPD, PHRPD, and CSAs M-16 and R-7 have maintained full governing bodies and advisory committees with infrequent and brief vacancies.

All agencies prepare and post meeting agendas and make minutes available as required. Additional outreach efforts include websites, emails and newsletters, articles in community newspapers, and advertisement of any special events. Those districts that perform significant outreach in addition to legally required activities include ARPD, PHRPD, CSA M-29 (through the City of San Ramon), and CSA R-7 (through the Alamo MAC). Outreach for CSAs M-30 and R-4 is performed by the towns of Danville and Moraga; however, these outreach activities are directed at town residents regarding park and recreation services provided by the towns, and not directed at CSA residents or regarding the CSAs and their functions. CSAs R-9 and R-10 perform minimal outreach with a brief description of the CSA and contact information available online on community websites. RWPRPD distributes flyers and notices to all residences in the community when necessary. CSAs M-16 and M-17 lack websites, have not posted contact information on other websites, and do not conduct any additional outreach activities.

With regard to outreach, there is generally a lack of websites promoting recreation programming within the CSAs and RWPRPD. While parks are easily identifiable through online mapping programs, information on recreation classes offered in the area is not readily available. It is recommended that RWPRPD and those CSAs with recreation programming compile websites with all available classes and locations to promote the use of these services. Larger recreation and park districts, such as ARPD, GVRPD and PHRPD, post recreation offering to their websites.

All of the agencies reviewed demonstrated full accountability in disclosure of information and cooperation with LAFCO during the MSR process, with the exception of RWPRPD. The District demonstrated limited accountability in its disclosure of information and cooperation with LAFCO. The agency did not responded to LAFCO's initial written questionnaire in a timely manner, but did ultimately submit the RFI at an in-person interview. The District did not provide follow-up comments or participate in the agency review process. Numerous calls and emails to the District soliciting comments went unanswered.

INFRASTRUCTURE NEEDS OR DEFICIENCIES

PARK ACREAGE

Table 3-7 shows the acres of additional parkland needed to meet existing standards based on current populations, and the acreage of parkland needed by 2025 to meet standards based on estimated future populations.

Every agency, with the exception of CSA M-16, has existing and future park acreage needs.[18] PHRPD has the highest level of existing and future acreage needs, due to the relatively large population of the District. PHRPD is in need of 57 acres of new developed parkland to meet existing standards, and nearly 78 acres to meet future demand based on population growth. CSAs M-29, M-30, R-4, and ARPD also have significant existing and future acreage needs. CSAs M-17, R-7, R-9 (within CSA boundaries) and R-10 have relatively less parkland needs than other agencies, and CSA M-16 is not in need of current or future parkland area. It should be noted, however, that CSA M-16 has the least amount of total parkland of all agencies, but meets existing and future standards based on the small population within the CSA.

Table 3-7: Park Acreage Needs

	Existing Acreage	Additional Acres Needed (Existing)	Additional Acres Needed (2025)
ARPD[1]	47.5	10.0	26.5
PHRPD	63.1	57.0	77.5
CSA M-16	2.4	0.0	0.0
CSA M-17	11.0	7.8	8.4
CSA M-29[2]	74.8	22.4	55.9
CSA M-30[3]	196.6	19.0	46.0
CSA R-4[4]	73.9	7.8	14.6
CSA R-7[5]	30.3	3.2	4.5
CSA R-9[6]	29.4	2.5	3.5
CSA R-9[7]	65.0	0.0	0.0
CSA R-10	13.5	3.7	5.9

Notes:
(1) Existing acreage indudes all District-maintained, County-maintained and City-maintained parks in the vicinity of ARPD.
(2) Existing acreage indudes only neighborhood parks maintained by the CSA. The CSA currently meets existing and 2025 community park LOS standadrs.
(3) Existing acreage indudes all local parks maintained by the Town of Danville, as CSA funds are passed through to the Town for maintenance of all park facilities, regardless of proximity to the CSA.
(4) Existing acreage indudes all park acres maintained by the Town of Moraga, as CSA funds are passed through to the Town for maintenance of all park facilities.
(5) Existing acreage indudes only neighborhood parks maintained by the CSA.
(6) Existing acreage indudes all CSA-maintained and RUSD-maintained parks in CSA R-9.
(7) Existing acreage indudes all CSA-maintained, RUSD-maintained, and City-maintained parks in the vicinity of CSA R-9.

FACILITY CONDITIONS

ARPD

The District reported that the Ambrose Park is currently in fair condition; however, significant upgrades are needed. Currently, the pool and related facilities, tennis courts, bocce ball court and basketball court are all closed and in a state of disrepair. Other existing areas of the park, while still open for use, are in need of improvements. The 2009 Ambrose Park Master Plan identified $10 to $12 million in renovations for the park. As of FY

[18] CSA R-9 has park acreage needs within the CSA boundaries; however, if park facilities located in adjacent cities, within 0.5 miles of the CSA are included, then no additional park acres are needed to serve the area currently or by 2025.

09-10, the District had $1.7 million to begin the first phase of rehabilitation.

The District has also identified several issues at the Ambrose Community Center that require funding and future improvements, including new exterior doors around the building, renovation of restrooms, new plumbing, kitchen improvements, and heating and air conditioning improvements. The District also identified the need for a full-time custodian at the community center.

GVRPD

Replacement of the Green Valley pool was identified as an infrastructure need in the 2008 MSR covering this district.

PHRPD

The majority of facilities within the District were reported to be in good or fair condition. Facilities reported as being in poor condition are the Pleasant Hill Community Center and Senior Center, the College Park Pool and Pleasant Oaks Park. Various infrastructure needs and deficiencies within PHRPD will be addressed in the coming years by Measure E bond funds, approved by District residents in August 2009. The $28 million general obligation bond will be used to construct a new senior center, a new teen center, a new community center, upgrades to Pleasant Oaks Park, and better restroom facilities at Rodgers-Smith Park, Pleasant Hill Park and Brookwood Park. All projects are anticipated to be completed by 2015.

RWPRPD

The Rollingwood Recreation Center is in fair condition. Infrastructure needs identified by the District include improving accessibility of the restroom facilities, improving ventilation for the janitor's closet, fireproofing or replacing the curtains on the stage, resurfacing and painting of stall lines in the parking lot, and purchasing a sound (microphone and speaker) system. The District does not have plans to increase capacity at the recreation center.

CSA M-16

Facilities in CSA M-16 are generally in fair condition. In terms of new facilities, the CSA is planning to construct a hiking trail; plans were in the design phase as of the drafting of this report.

CSA M-17

All facilities within the CSA were identified by the County as being in fair condition. Planned improvements to Montalvin Park include drainage and irrigation improvements, new pathways, restrooms, basketball and tennis courts, garbage cans, a water fountain, picnic tables, BBQs and benches, and improved landscaping. The County estimates that funding will be available for these improvements in 2010.

Plans for the MonTaraBay Park Community Center and Softball complex include new flooring, improved road access, restrooms, new turf, landscaping, and new pathways. The County estimates that funding will be available for these improvements in 2011.

CSA R-7

Facilities within CSA R-7 were identified by the County as being in excellent condition. Park facilities were reportedly built within the last 15 years; however, some facilities were also reported to have reached their full life expectancy, with replacements needed within the next few years.[19] It is recommended that the County and Alamo MAC collaborate to jointly plan future capital improvements at CSA R-7 parks.

CSA R-9

The only park facility is the Children's Reading Garden located at the county library in El Sobrante. The County reported that the garden is in good condition, and no infrastructure needs or deficiencies were identified.

The CSA plans to provide funding for improvements at four Richmond Unified School District schools and a new park totaling nearly $11 million between 2010 and 2011; however, there is presently no funding for these projects. Proposed improvements include a new swimming pool complex, a new basketball court, a new volleyball court, improved ballfields and play areas, restrooms, and picnic and BBQ areas.

CSA R-10

The recreation building and ball field within the CSA were identified by the County as being in fair condition. Planned improvements to the facility total $3.8 million and include new restrooms, improvement of the flooring and lighting in the recreation center, lights in the outfield, improved access, landscaping, and new fencing, drinking fountains, trash cans and picnic areas. According to the County's Parks CIP these improvements were estimated to be completed in 2010; however, there is presently no financing for these projects. Other needs include improved landscaping, restrooms, and new trash cans and gates at the Rodeo Creek Trail, which is owned jointly by the County and the Flood Control District. The County reported that the trail is currently in fair condition.

CSA M-29

No infrastructure needs or deficiencies were identified, given that all facilities within the CSA were constructed and opened relatively recently. The City of San Ramon has begun deferred maintenance planning to address needs as they arise.

CSA M-30

No significant infrastructure needs or deficiencies were identified for parks maintained by this CSA.

[19] The County Parks CIP identified various infrastructure needs within all CSA R-7 park facilities between 2009 and 2011; however, the Alamo MAC reported that many of the needs identified in the CIP are not necessary or were never discussed with the MAC.

CSA R-4

Moraga Commons and Rancho Laguna Park were both identified by the Town of Moraga as generally being in good condition. The Town reported that Rancho Laguna Park was in need of a new playground, an amphitheater upgrade, and repairs to the turf and irrigation. Hacienda de las Flores was identified by the Town as being in poor condition and in need of significant improvements, including ADA accessibility, kitchen upgrades, drainage improvements, repairs to the fireplace, refurbishment of the HVAC system and an expansion of the town office facilities. The Town anticipates that the drainage improvements will be addressed by FY 11-12 and relocation of Town offices by 2011. The Town had applied for a grant to refurbish the HVAC system by the end of FY 09-10, but the grant had not yet been awarded as of the drafting of this report.

SHARED FACILITIES

SHARED FACILITIES

Park service providers practice extensive facility sharing in Contra Costa County. As shown in Table 3-8, the park providers are able to offer additional or enhanced facilities and programs to the public through facility sharing that would otherwise not be available. These facilities and programs are operated through joint-use agreements and contracts with other public agencies, nonprofit organizations, and some private citizen committees. Most commonly, the districts collaborate with school districts to provide additional recreational areas and facilities to residents after school hours, which is the case for ARPD, PHRPD, and CSAs M-29, M-30, R-4, R-7, and R-10.

Of the park providers, the only two agencies that do not practice facility sharing—either in the past or presently—are CSA M-16 and GVRPD. While RWPRPD has made the community center available to the City of San Pablo and the County Sheriff, it is not presently sharing facilities with other agencies.

Many of the districts have ended facility sharing agreements over the past few years, due to the cost, complexity of reimbursement, or programming disagreements. CSA R-9 has provided financing to the Richmond Unified School District in the past but had to stop this practice due to lack of a regular revenue source. CSA R-4, through the Town of Moraga, is in the process of eliminating funding to the schools for maintenance, and recently ended a three-year cooperative relationship with the City of Lafayette sharing recreation programs. PHRPD reported that it had more extensively shared facilities with schools in the past, but involvement with schools has decreased in recent years due to difficulties related to funding arrangements. ARPD had previously maintained County-owned facilities by joint agency agreement; however, this agreement was terminated by the County in 2008. ARPD has partnered with the City of Pittsburg for improvements at Ambrose Park following the 2008 annexation of the park into the City.

Table 3-8: Facility Sharing Practices

District	Shared Facility	Facility Owner	Partner Agency	Partnership Function
ARPD	Ambrose Park	ARPD	City of Pittsburg	Joint facility improvements and maintenance
	Five schools	MDUSD	Mount Diablo Unified School District	After school programming by ARPD
	Bay Point Waterfront Trails	EBRPD	East Bay Regional Park District	Collaborated on common issues
PHRPD	Service Center/Maintenance Yard	City of Pleasant Hill	City of Pleasant Hill	Shared maintenance center
	Three schools and two pools	MDUSD	Mount Diablo Unified School District	Maintenance provided by PHRPD
CSA M-17	MonTaraBay Community Center	County	YMCA	Recreation programming by YMCA
CSA M-29	All SRVUSD schools	SRVUSD	San Ramon Valley Unified School District	Recreation programming and maintenance by City of San Ramon
CSA M-30	Hap Magee Ranch Park	Danville/County	Contra Costa County CSA R-7A	Maintenance funded jointly by Danville/County
	Five school parks	SRVUSD	San Ramon Valley Unified School District	Maintenance provided by Danville
	Iron Horse Trailhead	EBRPD	East Bay Regional Park District	Maintenance provided by Danville
CSA R-4	All MSD schools	MSD	Moraga School District	Funding for maintenance of the facilities from Moraga
	Hacienda de las Flores	Moraga	Town of Moraga	Recreation area is also used for the main town office.
CSA R-7	Hap Magee Ranch Park	Danville/County	Town of Danville	Maintenance funded jointly by Danville/County
	Alamo Elementary School Park	SRVUSD	San Ramon Valley Unified School District	Maintenance provided by County
	Rancho Romero School Park	SRVUSD	San Ramon Valley Unified School District	Park improvements provided by County
	Monte Vista Pool	SRVUSD	Danville, SRVUSD, Pool 2000 (a community citizens committee)	Jointly financed the development, operation and maintenance of the pool
CSA R-9	Children's Reading Garden	County	Contra Costa County Library and County Supervisor's Office	Jointly financed the development of the garden
CSA R-10	Rodeo Creek Trail	County/FCD	Flood Control District and Lighting and Landscaping District Zone 38	Maintenance provided by LLD Zone 38
	Lefty Gomez Recreation Building and Ballfields	JSUSD	John Swett Unified School District and Rodeo Baseball Association	Maintenance provided by County and RBA, recreation provided by RBA

OPPORTUNITIES

Given the recent economic decline and constrained park service revenues, districts would greatly benefit from efficiencies and cost savings achieved through facility sharing. In addition, residents would benefit from enhanced services levels gained from additional or enhanced facilities and programs. Opportunities for future facility sharing are generally limited to establishing or increasing collaboration with the local school district. The following opportunities for further facility sharing were identified.

ARPD: The District reported that it plans to explore community resources and other options for indoor offsite locations for recreation programs and activities, including increased collaboration with the school district. The District also reported that it plans to create new programs which can be held outdoors in the parks and outdoor facilities of the District, in order to maximize the number of recreation offerings.

CSA M-17: Opening school parks to the public through an agreement with the West Contra Costa Unified School District is an opportunity for future facility sharing that could enhance the CSA's service level.

CSA R-9: The CSA should consider financing of Richmond Unified School District park facilities to promote public use of the school parks outside of school hours. The CSA would need to find additional financing sources to provide a regular revenue stream to the school district.

REGIONAL COLLABORATION

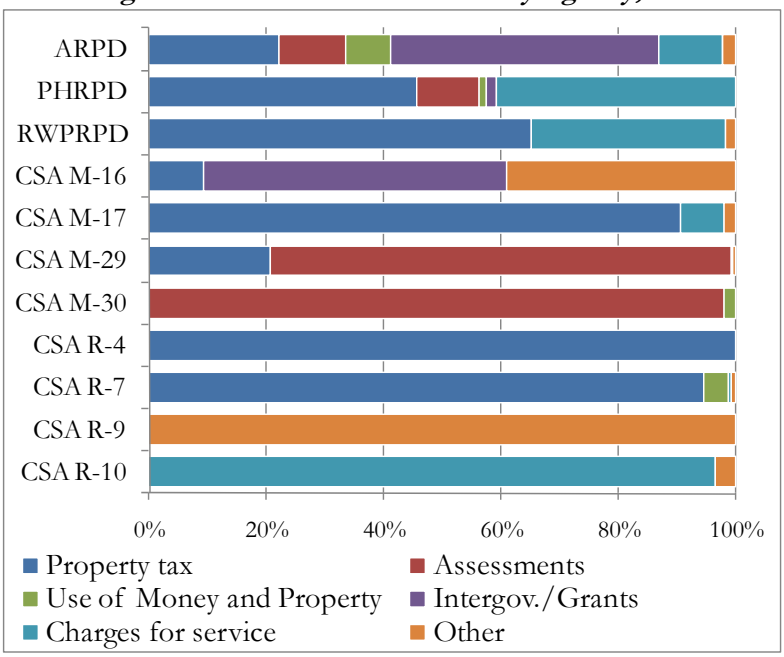
Park and recreation regional collaboration is generally limited to short-term partnerships with East Bay Regional Park District for special events or cooperation regarding common issues or concerns at a particular park or open space location. ARPD reported that it has worked with EBRPD on common issues relating to the Bay Point waterfront and trails, and CSA R-4 (Town of Moraga) has occasionally planned special Town events in conjunction with EBRPD.

FINANCING

The financial ability of agencies to provide services is affected by available financing sources and financing constraints. This section discusses the major financing constraints faced by special districts providing park and recreation services and identifies the revenue sources currently available to the service providers. Finally, it assesses the financial ability of agencies to provide services.

FINANCING SERVICES

Figure 3-1: Revenue Sources by Agency, FY 08-09



Property taxes and assessments are the primary financing source for most special districts providing park and recreation services, as shown in Figure 3-1. Every district, with the exception of CSAs R-9 and R-10, receives some funding via property taxes and/or assessments. Agencies that receive more than 60 percent of their funding through property taxes or assessments include RWPRPD (65 percent), CSA M-17 (90 percent), CSA M-29 (99 percent), CSA M-30 (98 percent), CSA R-4 (100 percent), and CSA R-7 (94 percent). ARPD receives 33 percent of its funding from property taxes and assessments, while PHRPD receives 56 percent, and CSA M-16 receives only nine percent.

Other significant financing sources include charges for service, and intergovernmental funds and grants. ARPD received 11 percent of revenues from charges for service, while PHRPD received 41 percent, RWPRPD received 33 percent, CSA M-17 received seven percent, and CSA R-10 received 97 percent. In terms of intergovernmental funds and grants, ARPD received 46 percent of revenues from grant funds for an afterschool program, and CSA M-16 received 52 percent of funds from a Proposition 12 grant.[20]

Significant financing sources classified as "other" in Figure 3-1 include park dedication funds for CSA R-9 (100 percent of revenues in FY 08-09) and CSA M-16 (39 percent), and donations for CSA R-10 (three percent).

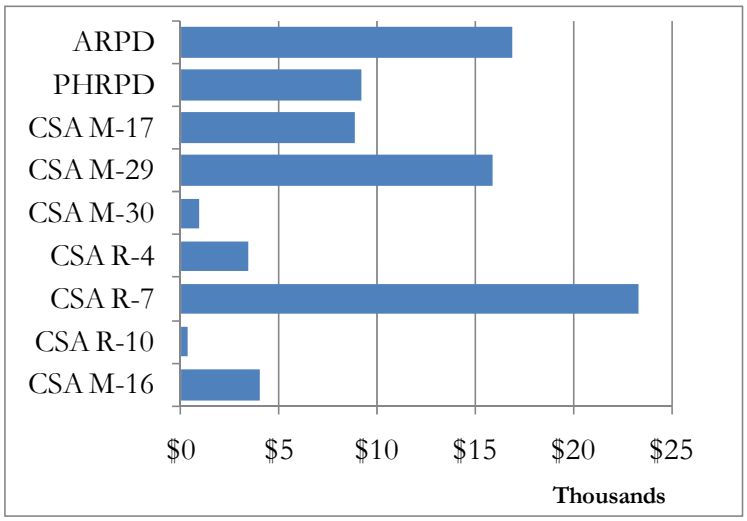
[20] Proposition 12 was known as the "Safe Neighborhood Parks, Clean Water, Clean Air and Coastal Protection Bond Act of 2000."

Proposition 1A

Due to the State budget crisis, in July 2009, the State legislature voted to suspend Proposition 1A, which ensures local property tax and sales tax revenues remain with the counties, cities and special districts.[21] Consequently, all local agencies will be required to loan eight percent of apportioned property tax revenues to the State with repayment plus interest by June 30, 2013. To mitigate the impact of the loss of revenues on the local agencies, the Proposition 1A Securitization Program enables local agencies to sell their Proposition 1A Receivables for cash proceeds to be paid in two installments in January and May 2010. All RPDs and CSAs that receive property tax passed resolutions to participate in the securitization program. The bond sales were successful, and the districts will receive eight percent of apportioned property tax revenues loaned to the State in FY 09-10.

OPERATING COSTS

Figure 3-2: Park Maintenance Cost per Acre, FY 08-09



Park Maintenance

Park maintenance cost per acre of maintained parkland is shown in Figure 3-2.[22] Of the special districts providing park maintenance services, ARPD, CSA M-29 and CSA R-7 all provide maintenance of at least $15,000 per acre of parkland maintained.[23] PHRPD and CSA M-17 each provide park maintenance at approximately the median level of $9,000 per acre. CSAs R-4 and M-16 provide maintenance below the median, between $3,000 and $4,000 per acre, and CSA M-30 and CSA R-10 provide the lowest levels of park maintenance expenditures per acre, at approximately $900 and $400, respectively.

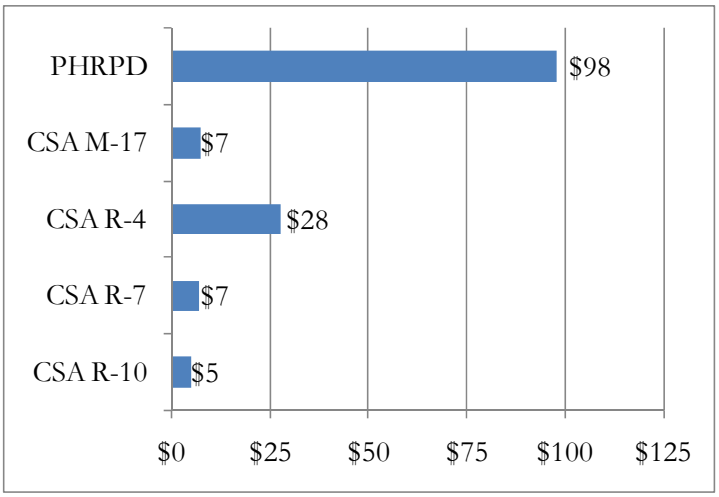
[21] Proposition 1A was passed by voters in 2004. It prohibits the State from reducing local government property and sales tax proceeds. The proposition may be suspended if the Governor declares a fiscal necessity and two-thirds of the State legislature approve the suspension.

[22] CSA R-9 was omitted from Figure 3-2 due to ambiguity in its financial statements. CSA R-9 included capital outlays that could not be separated from maintenance costs, and were therefore unrepresentative of the true level of maintenance per acre. Maintenance of Hap Magee Ranch Park was split between CSA R-7 (8.1 acres) and CSA M-30 (9.1 acres).

[23] RWPRPD also provides a high level of maintenance in terms of cost per acre; however, the amount is overstated because the District only maintains a single recreation facility on approximately 0.25 acres, and does not maintain parkland. It has therefore been omitted from Figure 3-2.

Recreation Programming

Figure 3-3: Recreation Cost per Capita, FY 08-09



Recreation expenditures per capita are shown in Figure 3-3.[24] Of the special districts providing funding for recreation programming, PHRPD provides by far the highest level of funding, at approximately $98 per capita. Recreation expenditures within the District are high because PHRPD provides all recreation programming for the City of Pleasant Hill, consisting of over 2,300 enrichment classes, recreation programs and activities per year. The Town of Moraga, funded partially through CSA R-4, expends nearly $28 per CSA resident on recreation. All remaining CSAs provide funding at a level less than $8 per capita.

CAPITAL FINANCING

Capital needs can be financed through the same sources as operations: property taxes, charges for service and interest income; however, development impact and in-lieu fees, grants, and bonded debt are also common sources for capital financing.

Development Impact Fees

Park development impact fees include park facility fees and park in-lieu fees. Park development impact fees are levied on new developments and renovations. Park facility fees can be used for park land acquisition, park and recreation facility construction, and renovation of existing facilities. Park in-lieu fees ("Quimby fees") are levied on new developments for the acquisition of new parkland. Developers may donate land to the county or city, or pay an in-lieu fee instead. Table 3-9 shows the agency responsible for setting and collecting park impact fees for each of the districts covered comprehensively in this MSR.

Table 3-9: Park Impact Fees

Agency	Impact Fees Set By
ARPD	County
PHRPD	City of Pleasant Hill and County
RWPRPD	County
CSA M-16	County
CSA M-17	County
CSA M-29	City of San Ramon
CSA M-30	County
CSA R-4	Town of Moraga and County
CSA R-7	County
CSA R-9	County
CSA R-10	County

[24] ARPD and RWPRPD were omitted from Figure 3-3 because recreation programming in both district is provided by independent contractors and is not funded by the agencies, and GVRPD was omitted because it was not comprehensively reviewed in this MSR. CSAs omitted from Figure 3-3 do not provide funding for recreation programming.

Figure 3-4: Park Impact Fee Comparison

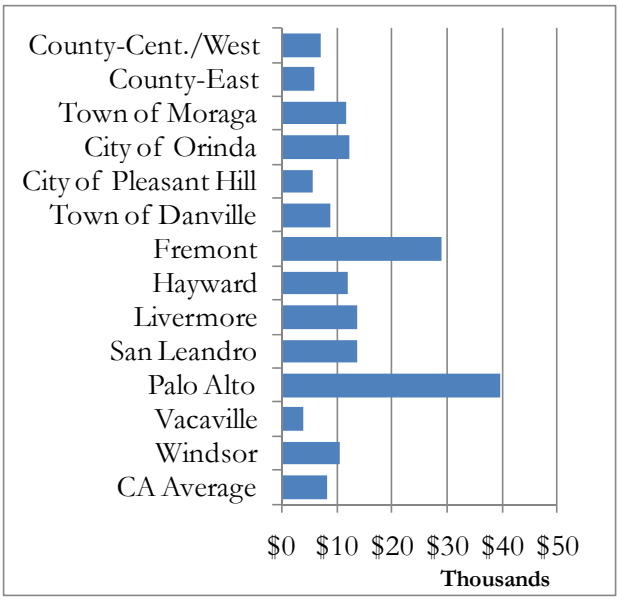


Figure 3-4 compares park impact fees levied by jurisdictions in Contra Costa to others nearby.[25] Most jurisdictions in Contra Costa charge more than the statewide average of $8,157 per unit, but less than the median level in Figure 3-4 of $11,575. Park impact fees set by the County are $5,891 per single-family home in the eastern portion of the County, and $7,238 in the west and central portions of the County. By comparison, the City of Pleasant Hill charges a park impact fee of $5,771 per unit, and the Town of Danville charges $8,718 per unit. In the Town of Moraga, park impact fees for a single-family home are $11,575, compared to $12,290 in the City of Orinda.

Jurisdictions in Alameda County (Fremont, Hayward, Livermore, and San Leandro) tend to charge slightly higher park impact fees than do those in Contra Costa County; however, jurisdictions in Solano (Vacaville) and Sonoma (Windsor) counties charge slightly less.[26]

Grants

Many local jurisdictions in California rely on state and county grants to acquire and improve local park facilities. In recent years, California has passed two statewide bond measures for funding parks and open space projects. The Proposition 40 funding program has several elements including a grant based on a per capita allocation, a matching grant and several competitive grant programs.

State Propositions 12 and 40—adopted in 2000 and 2002, respectively—provided funding for park capital investments; however, funding for both programs was suspended in December 2008 due to the California budget crisis. State funding for parks is also available as a result of Proposition 84, the Safe Drinking Water Bond Act, approved by California voters in 2006.

Bonded Debt

Recreation and park districts are authorized by the principal act to issue bonded debt for park improvements. The only districts with significant existing or upcoming bonded debt are East Bay Regional Park District (EBRPD) and Pleasant Hill Recreation and Park District (PHRPD).

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[25] The City of San Ramon was omitted from Figure 3-4 because the City does not receive development impact fees for park facilities associated with the Dougherty Valley Development in CSA M-29. Instead, park facilities are constructed as part of the development (at a density of 6.5 park acres per 1,000 residents), and turned over to the City as they are completed.

[26] Source of impact fees from City of Orinda and cities in Alameda, Santa Clara, Solano and Sonoma counties is Duncan Associates, *2008 National Impact Fee Survey*, Oct. 2008.

Table 3-10: Measure WW Allocations by Agency

Agency	City/Community	2008 Allocation
ARPD	Bay Point	$1,127,177
GVRPD	Cameo Acres	$50,870
PHRPD	Pleasant Hill Area	$1,733,666
CSA M-16	Clyde	$36,321
CSA M-17	Tara Hills/Bayview-Montalvin	$541,039
CSA M-29	San Ramon	$2,696,685
CSA R-4	Town of Moraga	$737,587
CSA R-9	El Sobrante	$641,740
CSA R-7	Alamo	$817,931
CSA R-10	Rodeo	$456,305
EBRPD/ County	Other Unincorporated	$3,046,374

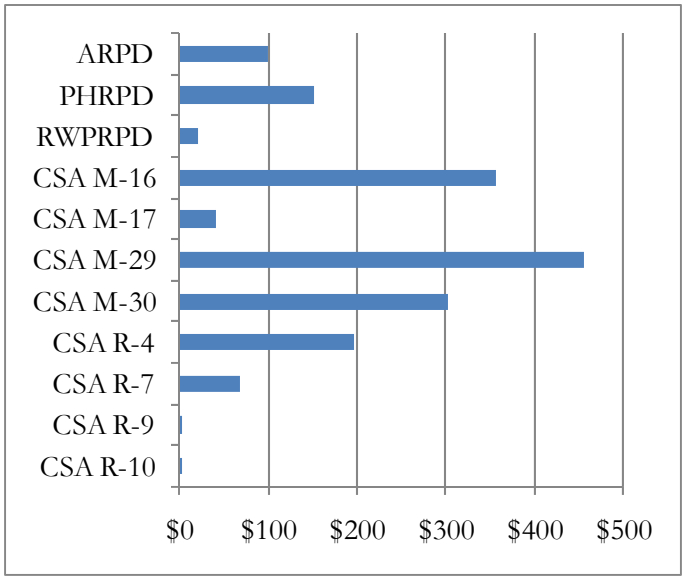
Note:
CSA M-30 is within the Alamo Census Designated Place and is thus included within the Alamo/CSA R-7 allocation.

In EBRPD, Measure AA was approved in 1988 and extended in 2008 as Measure WW. The $500 million bond extension allows the District to continue acquiring parkland and preserving natural habitat and open space, with 75 percent of the bond funds slated for regional park acquisition and capital projects. Of the 67 capital projects identified for Measure WW funding, 36 are located in Contra Costa County, with 13 of these projects involving the acquisition of new parkland. The remaining 25 percent of bond funds, or $125 million, is reserved for local grants (at a per capita allocation of $45.70). As of February 2010, only PHRPD and ARPD had Measure WW local grants approved by EBRPD, and no funds had yet been expended.

In PHRPD, Bond Measure E, a $28 million general obligation bond for facility upgrades, was approved by district residents in August 2009. According to the preliminary schedule, the first bond series of approximately $17.2 million will be issued in March of 2010, to fund construction of a new senior center and new teen center. A second bond series of approximately $9.8 million will be released in 2012, and the final issuance of approximately $1 million in 2015. Other projects to be funded by bond revenues include a new community center, upgrades to Pleasant Oaks Park, and better restroom facilities at Rodgers-Smith Park, Pleasant Hill Park and Brookwood Park.

FINANCIAL ABILITY

Figure 3-5: Total Revenue per Capita, FY 08-09



The financial ability of agencies to provide park and recreation services varies significantly. Figure 3-5 shows total revenues per capita for the special districts providing park and recreation services reviewed in this MSR.

Agencies with a funding level of at least $100 per capita include ARPD, PHRPD, CSA M-16, CSA M-29, CSA M-30, and CSA R-4. These agencies were generally able to provide the highest service levels with the best financial ability to provide services. Agencies with a funding level between $40-70 per capita include CSA M-17 ($41) and CSA R-7 ($67), and agencies

with funding at or below $20 per capita include RWPRPD ($20), CSA R-9 ($1) and CSA R-10 ($4).

PHRPD, and CSAs M-30 and R-4 reported that finances were generally adequate to provide services. ARPD and RWPRPD reported that while finances are adequate to provide a sufficient level of service, the districts operate under budgeting constraints. The County-administered CSAs reported that financing levels were inadequate to provide satisfactory services. The City of San Ramon reported that the present financing level within CSA M-29 was not adequate as the number of dwelling units sold and paying assessments was not keeping up with the cost of providing services in the area.

MSR DETERMINATIONS

This section sets forth recommended findings with respect to the service-related evaluation categories based upon this review of municipal services for Contra Costa County.

LAFCO is required to identify governance options; however, LAFCO is not required to initiate changes and, in many cases, is not empowered to initiate these options.[27] LAFCO is required by the State to act on SOI updates. The Commission may choose to recommend governmental reorganizations to particular agencies in the county, using the spheres of influence as the basis for those recommendations (Government Code §56425 (g)).

PRESENT AND PLANNED CAPACITY OF PUBLIC FACILITIES AND INFRASTRUCTURE NEEDS

1) Of the 10 special districts providing park maintenance services, only CSA M-16 meets the LOS standard established for the agency. CSA M-29 meets the LOS standard for community park acreage, but not for neighborhood park acreage. All other park providers do not meet established LOS standards.

2) Every agency, with the exception of CSA M-16, has existing and future park acreage needs. PHRPD, CSAs M-29, R-4 and R-7A and ARPD have significant existing and future acreage needs. CSAs M-17 and R-10 have relatively less parkland needs than other agencies.

3) Existing facilities within CSAs M-16, M-29, M-30, R-9 and R-4 were identified as being in good or excellent condition and had minimal infrastructure needs or deficiencies. While facilities within CSA R-7 were identified as being in excellent condition, significant improvements were identified as being needed in the County Parks CIP. It is recommended that the County and Alamo MAC collaborate to jointly plan future capital improvements at CSA R-7 parks. .

4) ARPD, PHRPD, and CSAs M-17 and R-10 have significant park and recreation capital needs and deficiencies. RWPPRD's facility is in fair condition and needs moderate improvements.

[27] LAFCO can initiate SOI changes, along with mergers, consolidations, dissolutions, district formations, and creation of subsidiary districts. LAFCO cannot initiate annexations, detachments, and incorporations.

5) All of the park and recreation facilities within CSA M-29 were constructed and opened between 2000 and 2009. There are limited needs and deficiencies presently; however, as the facilities age in the next 10 to 15 years, there will be a need for significant capital funding for facility rehabilitation. The City of San Ramon has begun maintenance and renovation planning to address these anticipated future capital needs.

ADEQUACY OF PUBLIC SERVICES

6) Additional park acres are needed within all districts, with the exception of CSA M-16, to meet existing LOS standards, and additional acres will be needed to address population growth in the future.

7) Resident involvement in recreation activities may be indicative of agency outreach efforts. Program participation and rental usage is highest in PHRPD, RWPRPD and ARPD. Recreation demand is much lower within the CSAs.

8) There is generally a lack of websites promoting recreation programming within the CSAs. It is recommended that those agencies with recreation programming compile websites with all available classes and locations to promote the use of these services.

9) ARPD, PHRPD, and CSA M-29 are professionally managed and generally follow best management practices. These are the only districts that perform annual financial audits.

10) The County completes an annual audit for countywide finances; however, CSA information is not identifiable in these statements. It is recommended that CSA information be reported separately to improve clarity and transparency.

11) All of the districts 1) perform annual employee evaluations on at least an annual basis, with the exception of RWPRPD, 2) prepare timely annual budgets, 3) maintain current financial records, and 4) adopt long-term park capital improvement plans, also with the exception of RWPPRD.

12) It is recommended that all districts whose board members serve as staff consult with their legal counsel regarding the statutory authority for such dual service, and ask legal counsel to evaluate whether any prohibited conflicts of interest, incompatible activities or other legal problems might arise from this arrangement.

GROWTH AND POPULATION PROJECTIONS

13) Demand for municipal park and recreation services is affected primarily by population growth. Demand is also affected by growth among population segments with higher park visitation rates such as younger and higher-income people.

14) Localized demand changes will primarily depend on development. Areas with anticipated high growth rates include CSAs M-29 and ARPD. While CSA M-30 may experience a high growth rate at build-out, overall population growth will only consist of approximately 50 residents. CSAs R-4, R-10 and M-16 anticipate modest growth through 2025. Growth in all other districts is anticipated to be minimal.

FINANCIAL ABILITY OF AGENCIES TO PROVIDE SERVICES

15) Property taxes and assessments are the primary funding stream for park and recreation services. Of the 11 agencies comprehensively reviewed in this MSR, six receive more than 60 percent of their funding from property taxes and/or assessments. Only CSAs R-9 and R-10 do not receive any funding from property taxes or assessments.

16) Districts faced significant financial pressure due to the suspension of Proposition 1A, which loaned eight percent of apportioned property tax revenue to the State; however, all PRDs and CSAs that receive property tax will be participating in the Proposition 1A Securitization Program for reimbursement of these funds.

17) In terms of park maintenance expenditures per acre, ARPD, CSA M-29 and CSA R-7 provided the highest service levels, and PHRPD and CSA M-17 provided slightly lower service levels. CSA M-30 and CSA R-10 provided the lowest service levels.

18) In terms of recreation expenditures per capita, PHRPD provides by far the highest service level. PHRPD expends nearly $98 per district resident, compared to all other agencies providing recreation that expend less than $8 per capita.

19) Within the agencies reviewed, park development impact fees are highest for CSA R-4 (Town of Moraga). Park impact fees charged by the County are lower than the average park impact fee charged statewide. Park development impact fees appear to be deficient in the City of Pleasant Hill, and may account for the deficit of parkland in the District.

20) Total revenues per capita exceed $100 in ARPD, PHRPD, and CSAs M-16, M-29, M-30 and R-4. These agencies were generally the ones providing the highest service levels and with the best financial ability to provide services. Agencies with a funding level between $40-70 per capita include CSA M-17 and CSA R-7, and agencies with funding at or below $20 per capita include RWPRPD, CSA R-9 and CSA R-10.

21) CSAs that pass through their funds to cities within or adjacent to their bounds (i.e. CSAs M-29, M-30 and R-4) generally have higher service levels, because CSA funds are merely augmenting existing city funds for parks and recreation services. The cities reported that financing, while constrained, is generally sufficient to provide park and recreation services.

22) The financial ability of PHRPD to provide service will be enhanced in the coming years by Bond Measure E that was approved by district residents in August 2009. The $28 million bond will fund various new facilities and upgrades within the District.

23) One financial limitation reported by the City of San Ramon is that the County has been slow to provide reimbursements from CSA M-29 for park expenditures in the City in recent years.

24) If districts charge fees for service, it is recommended that fees be reviewed and updated regularly. If districts charge a benefit assessment, and does not utilize a CPI adjustment, it is recommended that they do so.

STATUS OF, AND OPPORTUNITIES FOR, SHARED FACILITIES

25) Park service providers practice extensive facility sharing in Contra Costa County. Most commonly, the districts collaborate with school districts to provide additional recreational areas and facilities to residents after school hours, which is the case for ARPD, PHRPD, and CSAs M-29, M-30, R-4, R-7A, and R-10.

26) Of the park providers, only CSA M-16 and GVRPD have not in the past and do not presently practice facility sharing to some extent.

27) Opportunities for future facility sharing are generally limited to establishing or increasing collaboration with the local school district. In addition, ARPD plans to explore community resources and other options for indoor offsite locations for recreation programs and activities.

ACCOUNTABILITY FOR COMMUNITY SERVICE NEEDS

28) Accountability is best ensured when there is sufficient constituent interest to maintain full governing boards or advisory committees, constituent outreach is conducted to promote accountability and ensure that constituents are informed and not disenfranchised, and public agency operations and management are transparent to the public.

29) Generally, when there is a lack of constituent interest in an agency's activities, governing bodies are challenged to fill board and advisory committee positions. In the case of the park service providers, four districts have had extended board vacancies or lack an advisory committee altogether, including RWPRPD, and CSAs M-17, M-30, and R-9.

30) A possible opportunity for improved constituent interest and involvement may be to combine the advisory committees of CSAs R-9 and R-10 with the municipal advisory council for the area as was done for CSA R-7.

31) Accountability to constituents is constrained in CSAs M-29 and R-4, where the residents in the unincorporated areas being served by the cities are not eligible to sit on the city park commissions.

32) All agencies prepare and post meeting agendas and make minutes available as required. Those districts that perform significant outreach in addition to legally required activities include ARPD, PHRPD, CSA M-29, and CSA R-7. Limited outreach activities are performed by CSAs M-30, R-4, R-9, and R-10 and RWPRD. CSAs M-16 and M-17 do not perform any outreach activities. Websites with contact information are a recommended practice for all local agencies.

33) All of the agencies reviewed demonstrated full accountability in disclosure of information and cooperation with LAFCO during the MSR process, with the exception of RWPRPD, which demonstrated partial cooperation.

GOVERNMENTAL STRUCTURE AND OPERATIONAL EFFICIENCIES

This section discusses issues and problems with respect to the current organization of special districts providing park and recreation services in Contra Costa County. It identifies alternatives to the current government structure of service providers, including potential for consolidation or dissolution of various agencies.

Dissolution of RWPRPD

RWPRPD consists of 109 acres of unincorporated Contra Costa County, located between the Cities of San Pablo and Richmond, west of I-80. Historically, as portions of the District have been annexed to the City of San Pablo, they have been detached from RWPRPD. The District reported that the City of San Pablo had previously shown interest in annexing the entire community of Rollingwood, but the proposal was rejected by the community due to concerns over tax increases following annexation to the City. The District reported that it would not be opposed to annexation to the City of San Pablo in the future, as long as Rollingwood residents do not lose the services they have grown accustomed to.[28]

RWPRPD reported that generating community involvement and interest in the activities of the District has been difficult over the last 10-15 years. As an example, the District cited the fact that only three community members showed up to a recent town hall meeting that had been advertised throughout the community. Due to a lack of community interest in serving on the board, the District changed from a five-member board to a three-member board in 1999; however, a three-member board is not allowed under the principal act.

LAFCO reported significant accountability problems with the District during the previous MSR cycle, and few improvements seem to have been made since then.[29] Although RWPRPD is within City of San Pablo's SOI, establishing a subsidiary district would not be possible until at least 70 percent of the land area and registered voters in Rollingwood are annexed to the City.[30]

As part of the Request for Information by LAFCO to RWPRPD during the 2003-4 MSR cycle, LAFCO Executive Officer Annamaria Perrella identified dissolution of RWPRPD as a governance alternative, with the County named as the successor agency, to continue providing services to the area through a County Service Area. CSA R-9 is located adjacent to the boundaries of RWPRPD, and would be the logical successor agency; however, the CSA has also suffered from a lack of constituent interest in recent years (it only has one public member on the five-member advisory committee), and has a lack of existing park and recreation capacity. A governance alternative affecting both agencies would be to consolidate RWPRPD with CSA R-9, and then combine the CSA R-9 advisory committee with the El Sobrante Municipal Advisory Council (ESMAC).[31] As of

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[28] Interview with Charlotte Rude, RWPRPD Building Manager and Director, November 10, 2009.

[29] See LAFCO Executive Officer's Report and Recommendation, dated August 6, 2003.

[30] California Government Code §57105.

[31] The process for performing this action would be to (a) disband the CSA Advisory Committee, (b) Amend the ESMAC resolution to add parks and recreation services, and (c) apply to LAFCO to activate the latent power to fund the services of a MAC per Government Code §25213(o).

March 2010, the County had already been in discussions to combine the CSA R-9 advisory committee with ESMAC.

Dissolution of CSA R-9

As CSA R-9 has no regular source of financing, lacks public interest to fill advisory committee positions, and provides minimal services at a less than adequate service level, a governance alternative for the CSA may be dissolution. Since 1974, the CSA has failed to find additional fixed funding sources other than developer fees to finance services. In addition, there is an apparent lack of constituent interest in the CSA's activities as the advisory committee presently has four vacant seats. The County reported that it is amenable to exploring options, including dissolution of this CSA, if a better and more efficient funding source is available to provide the same services to the public. If the CSA were dissolved, any financing formerly received by the CSA for the maintenance of the Children's Reading Garden could be transferred to the library to guarantee continued maintenance of the facility.

Formation of a subsidiary district to the City of Pittsburg (ARPD)

Governance alternatives for ARPD pertain largely to the unusual configuration of the district's boundaries with relation to the City of Pittsburg. The boundaries of ARPD include the unincorporated community of Bay Point, but also portions of the City of Pittsburg. In areas were ARPD boundaries overlap City boundaries (e.g., along Bailey Road south of SR 4) there would appear to be a duplication of services, as both ARPD and the City of Pittsburg provide local park and recreation services. Other areas currently within the city limits were detached from ARPD upon annexation to the City, creating a large "hole" within the boundary of ARPD south of SR 4.

The short-term service area for ARPD is primarily concentrated north of SR 4, with the exception of Ambrose Park, which is located just south of SR 4. In the longer term, the entire area may be better served by the City of Pittsburg. The entire ARPD boundary is within the City of Pittsburg's planning area and SOI, and the City previously indicated a desire to eventually annex the community of Bay Point.[32] Upon annexation of the community of Bay Point, LAFCO may wish to establish ARPD as a subsidiary district of the City of Pittsburg, as nearly all district area would be within the Pittsburg city limits at that point.

Formation of a subsidiary district to the City of Pleasant Hill (PHRPD)

PHRPD primarily provides recreation and park service to the City of Pleasant Hill. Although the District meets the legal requirement for establishment of a subsidiary district (of the City of Pleasant Hill) based on land area and registered voters, the District has functioned as an independent agency since 1951 and continues to provide adequate services to taxpayers. There is no evidence to suggest that the District would necessarily be better run, or residents provided better services, if the City ran the district or provided recreation and park services directly.

[32] Contra Costa LAFCO: East County Sub-Regional MSR, Adopted December 10, 2008, Page VI-15.

Duplication of CSA Services

CSA R-7 encompasses the bounds of CSA M-30 with the exception of approximately seven acres adjacent to the Town of Danville. Residents within CSA M-30 pay a benefit assessment to the County, which is transferred to the Town for enhanced parks and recreation, law enforcement, street maintenance, landscaping, and street lighting.[33] The residents within CSA M-30 are also paying property taxes to CSA R-7 for park and recreation services. CSA M-30 residents are paying for park and recreation services to two CSAs and there are no park facilities within the CSA. The nearest park facility is Hap Magee Ranch Park, which is partially located within the Town of Danville and unincorporated Contra Costa County, and is jointly owned and maintained by the County (CSA R-7) and Town (supplemented with CSA M-30 funds). The nearest County-owned facility, financed solely by CSA R-7 funds, is Andrew H. Young Park, which is approximately one mile from the border of CSA M-30. One governance alternative may be the removal of the territory in CSA M-30 from CSA R-7. Another option may be the consolidation of the two CSAs into a single CSA. Such a CSA would require a zone for the area formerly within CSA M-30 to maintain the financing mechanism for enhanced services by the Town of Danville per the agreement between the Town and the County.

CSA Constituent Accountability

Accountability to constituents within the park and recreation CSAs is constrained due to a lack of representation on advisory committees or the lack of a citizens advisory committee altogether. Of the CSAs reviewed, only M-16 and R-7A have some form of advisory committee or council to act as a sounding board for the community to voice local preferences to the County or managing municipality. The CSAs face the following challenges regarding constituent representation and input regarding CSA issues and concerns:

- CSAs M-17 and M-30 suffer from a lack of representation on any kind of advisory committee altogether. The advisory committee for M-17 was disbanded by the Board of Supervisors in 1990, due to a high degree of tension and acrimony at meetings. There is no advisory committee for CSA M-30, and residents of the CSA are not eligible to sit on the Town of Danville's Parks and Leisure Services Commission—although town park services are receiving financing from the CSA—as they reside in the unincorporated area just outside of the town limit.

- The advisory committee for CSA R-9 has four vacant seats out of five committee positions.

- The boundaries for both CSA M-29 and R-4 partially overlap with the City of San Ramon and Town of Moraga, respectively. Residents in the unincorporated areas are not eligible to sit on the city park commissions; although the cities receive funding from the CSAs to provide services to the area.

[33] Residents of CSA M-30 also pay property tax to CSA P-6 and a special assessment and property tax to CSA P-2 (Zone B) for police protection services, which may be an additional duplication of services, as CSA M-30 assessments also fund law enforcement through the Town of Danville, by contract with the Sheriff.

In order to improve constituent interest and involvement within the CSAs, the County and cities administering the CSAs may wish to consider the following options:

- Combining the advisory committees of CSAs R-9 and R-10 with the existing municipal advisory council (MAC) for the area as was recently done for CSA R-7. The MACs are regulated by adopted County policies, with requirements for meetings, training, operating procedures, and annual reports to the Supervisors. The MACs are generally well publicized and have sufficient public interest to retain a full council body.

- Allowing CSA residents in the unincorporated areas that are financing municipal park services to sit on the park and recreation commissions.

- Reinstating or forming advisory committees in the CSAs that presently lack a means to voice community preferences.

MSR Process

In order to streamline the MSR process in the future, CSA M-29 should be reviewed in conjunction with the City of San Ramon, CSA R-4 should be reviewed in conjunction with the Town of Moraga, and CSA M-30 should be reviewed in conjunction with the Town of Danville.

4. CEMETERY SERVICES

This section provides an overview of the cemetery services in Contra Costa County, including how these services are provided, as well as growth and population projections, current and future service needs, infrastructure needs, service adequacy, and financing. The focus of the chapter is on public cemetery providers under LAFCO jurisdiction; however, other providers are listed in the provider overview section for completeness. Government structure options are identified for local agencies under LAFCO jurisdiction.

PROVIDER OVERVIEW

This section provides an overview of cemetery service providers in Contra Costa County, focusing on how these services are provided by public agencies under LAFCO jurisdiction.

REGULATORY FRAMEWORK

The principal act that governs the districts is the Public Cemetery District Law.[34] The principal act authorizes districts to own, operate, improve, and maintain cemeteries, provide interment services within its boundaries, and to sell interment accessories and replacement objects (e.g., burial vaults, liners, and flower vases). Although districts may require and regulate monuments or markers, districts are precluded from selling them. Districts are also restricted from acquiring mausoleums constructed after 1937 or constructing new ones.[35] The principal act requires districts to maintain cemeteries owned by the district.[36]

The law allows districts to inter non-residents under certain circumstances.[37] Non-residents eligible for interment are described in California Health and Safety Code §9061, and include:

- former residents,
- current and former taxpayers,[38]
- family members of residents and former residents,[39]

[34] California Health and Safety Code §9000-9093.

[35] However, a district may construct additions to a legally built or acquired mausoleum to maintain service.

[36] California Health and Safety Code §9040.

[37] Non-residents eligible for interment are described in California Health and Safety Code §9061, and include former residents, current and former taxpayers, family members of residents and former residents, family members of those already buried in the cemetery, those without other cemetery alternatives within 15 miles of their residence, and those who died while serving in the military.

[38] Former taxpayers must have paid property taxes on property located in the district for continuous period of at least five years, a portion of which time period shall have occurred within the 10 years immediately before the person's death.

[39] Family members as defined in §9002(e) are "a spouse, by marriage or otherwise, child or stepchild, by natural birth or adoption, parent, brother, sister, half-brother, half-sister, parent-in-law, brother-in-law, sister-in-law, nephew, niece, aunt, uncle, first cousin, or any person denoted by the prefix 'grand' or 'great,' or the spouse of any of these persons."

- family members of those already buried in the cemetery,
- those without other cemetery alternatives within 15 miles of their residence, and
- those who died while serving in the military.

In accordance with Health and Safety Code §9065, all cemetery districts must create an endowment fund for the perpetual maintenance of the cemetery facilities. The districts are required to collect a minimum endowment care fee for each interment right sold.[40] The principal of the endowment fund may only be used for investment purposes. Any income from those investments may be used for care of cemeteries owned by the district.

SERVICE PROVIDERS

Public cemetery services in Contra Costa County are provided by the Alamo-Lafayette Cemetery District (ALCD) and the Byron-Brentwood-Knightsen Union Cemetery District (BBKUCD). Private cemetery services are also provided by various religious organizations and private enterprises throughout the County.

ALCD and BBKUCD are independent special districts responsible for operating, maintaining, improving, and expanding cemeteries within their district bounds.

Alamo-Lafayette Cemetery District

ALCD provides cemetery operations and maintenance services to the Alamo Cemetery and Lafayette Cemetery. The boundaries of ALCD include portions of various incorporated areas, including the southwestern portion of the City of Walnut Creek, the majority of the City of Lafayette and the Town of Danville, the eastern portion of the City of San Ramon, and the unincorporated communities of Alamo, Blackhawk, Diablo, and a portion of the unincorporated community of Walden (in the area of Contra Costa Centre north of Walnut Creek). The District has a boundary area of approximately 84 square miles, and serves a population of approximately 162,700.

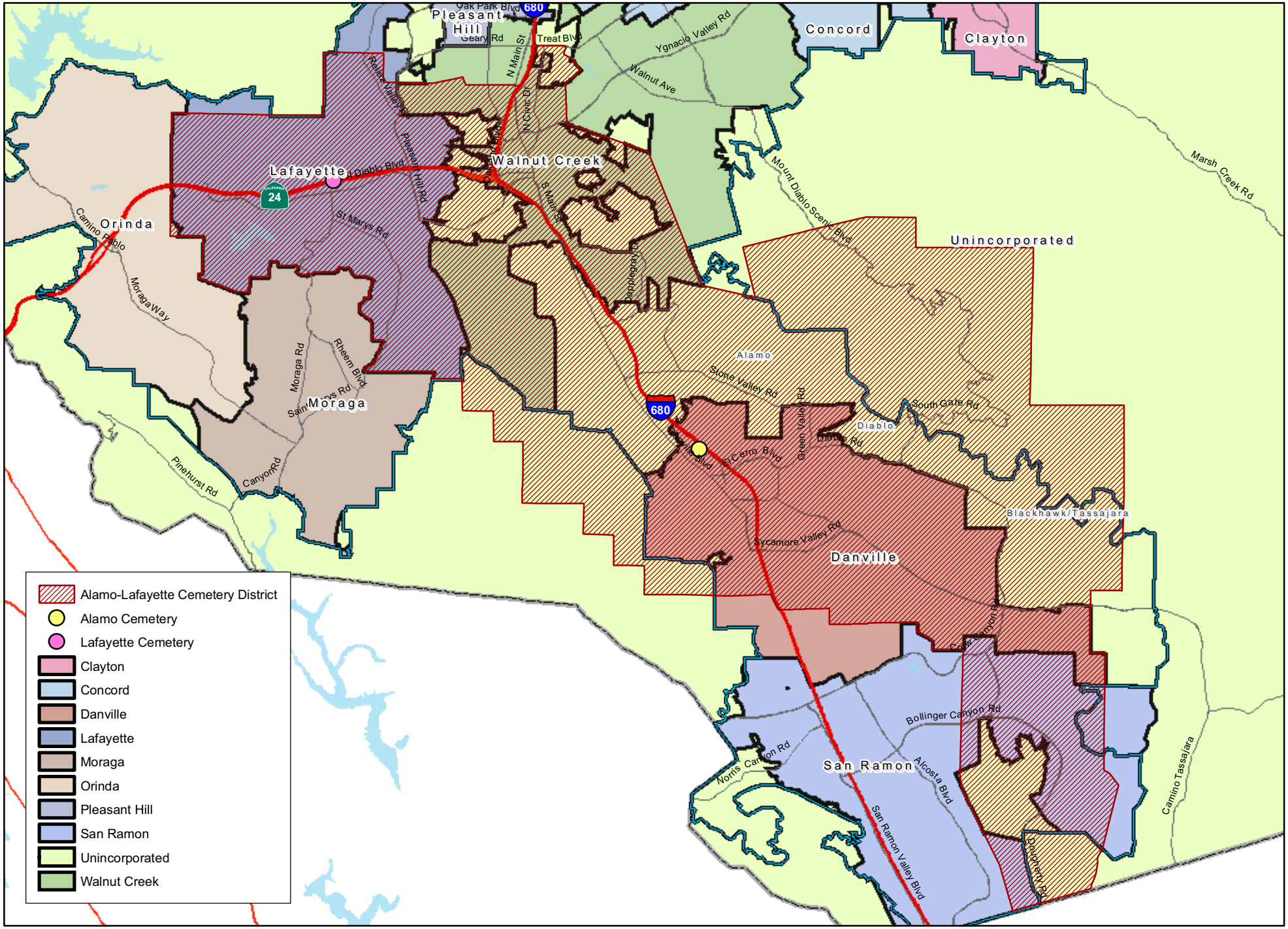
Byron-Brentwood-Knightsen Union Cemetery District

BBKUCD provides cemetery operations and maintenance services to the Union Cemetery. The boundaries of BBKUCD include the unincorporated communities of Byron, Knightsen, Discovery Bay, Bethel Island, the eastern portion of Morgan Territory, the City of Brentwood, the eastern portion of the City of Oakley (east of Sellers Avenue), and various Delta islands. The District has a boundary area of approximately 203 square miles, and serves a population of approximately 75,000.

[40] The minimum endowment care fee as defined in Health and Safety Code §8738 is $4.50 a square foot for each grave, $70 for each niche, $220 for each crypt; provided, however, that for companion crypts, there shall be deposited $220 for the first crypt and $110 for each additional crypt.

Map 4-1

Alamo-Lafayette Cemetery District and Coterminous SOI



Map created 1/2/2010
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Community Development Division--GIS Group
651 Pine Street, 4th Floor North Wing, Martinez, CA 94553-0095
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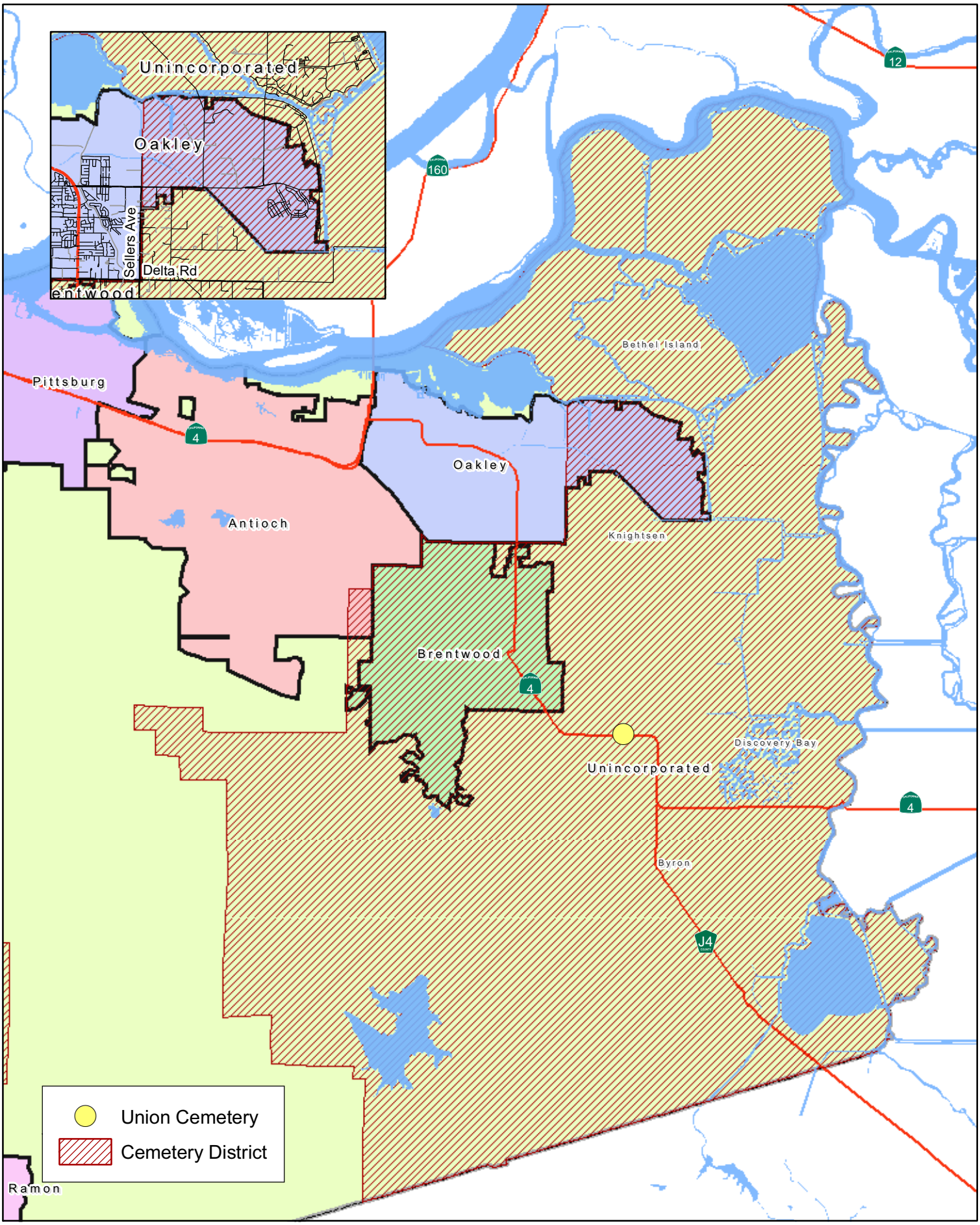
0 1 2 4 Miles

Map 4-2 Byron Brentwood Knightsen Union Cemetery District and Coterminous SOI



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by Contra Costa County Conservation and Development Department,
Community Development Division--GIS Group
651 Pine Street, 4th Floor North Wing, Martinez, CA 94553-0095
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Non-LAFCO Agencies

There are various private providers of cemetery service in Contra Costa County, which residents may choose in-lieu of a public cemetery. There are also family and historical pioneer cemeteries within the County; however, these cemeteries are not open to the public for burials, or are at capacity and are not conducting new burials. Cemetery facilities owned or maintained by non-LAFCO agencies within the County are listed in Table 4-1.

Table 4-1: Non-LAFCO Cemetery Providers

Cemetery	Location
Holy Cross Cemetery	Antioch
Oakview Memorial Park	Antioch
Live Oak Cemetery	Concord
Memory Gardens Memorial Park	Concord
St. Stephen's Cemetery	Concord
Sunset View Cemetery	El Cerrito
Carmelite Monastery Cemetery	Lafayette
Oakmont Memorial Park	Lafayette
Queen of Heaven Cemetery	Lafayette
St. Catherine's Cemetery	Martinez
Seasons Cemetery	Pacheco
St. Joseph's Cemetery	San Pablo

Sources:
Contra Costa Genealogical Society, *California Cemetery Records in Contra Costa County*, Vol. III, 1990, and http://graveyardrabbitofcontracostacounty.blogspot.com/

SERVICE DEMAND

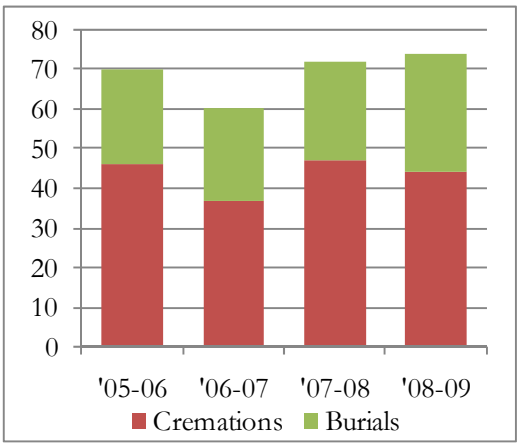
DEMAND DRIVERS

Demand for interment services is dependent upon the number of deaths among those who wish to be interred in the community and the availability of alternatives to public cemetery providers.

Death rates are generally stable across time. Between 2000 and 2007, death rates in California and Contra Costa showed no significant changes. During that time Contra Costa County had a median death rate of 68 per 10,000 individuals countywide, which was slightly higher than the statewide median rate of 65.[41]

INTERMENTS AND NICHE PLACEMENT

Figure 4-1: ALCD Cemetery Service Demand



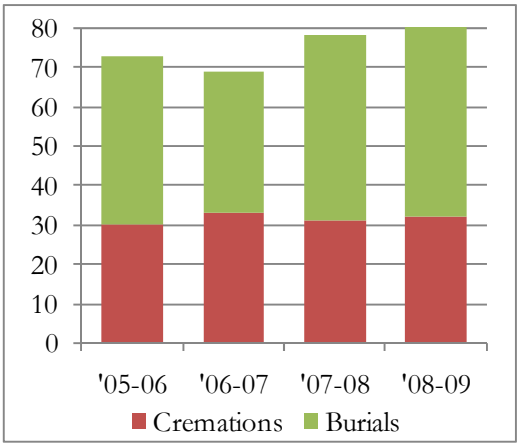
The number of interments performed annually is indicative of the demand for cemetery services in each district. Figure 4-1 shows the total number of cremation interments/niches and regular interments (burials) from FY 05-06 to FY 08-09 for ALCD. ALCD performed an average of 69 total interment services per year in recent years, including an average of 44 cremation interments and 26 regular burials.

ALCD performed an average of 23 cremation interments and four regular interments per year at

[41] State of California, Department of Public Health, Death Records, 2009.

Alamo Cemetery, and 21 cremation interments and 22 regular interments per year at Lafayette Cemetery. Cremation interments are more common at Alamo Cemetery because the facility is at capacity for in-ground burials, and no longer has full plots available for sale.[42]

Figure 4-2: BBKUCD Cemetery Service Demand



BBKUCD performed an average of 75 interment services per year in recent years at Union Cemetery, including an average of 31 cremation interments and 44 regular interments per year.

On the basis of interments per 10,000 district residents, ALCD averaged approximately four interment services per 10,000 residents from FY 05-06 to FY 08-09, and BBKUCD averaged approximately 10 interment services per 10,000 residents over the same time span. One reason for the difference in these two rates is likely the relatively fewer cemetery alternatives in eastern Contra Costa County.

PROJECTED DEMAND

Natural population growth, in addition to population growth brought about by new residential construction, will increase demand for cemetery services in the future. Both ALCD and BBKUCD appear to have sufficient capacity for the next 15-20 years, even accounting for population growth.[43]

Both districts reported that the demand for cremation burial and niche placement has increased over the last 10 to 15 years, shifting away from full body burial services. Cremation services are significantly more economical from a cost standpoint for the consumer and from a land use standpoint for the cemetery. For the public cemetery districts in Contra Costa County, an average full body burial costs about three times what a single cremation niche does (approximately $3,900 vs. $1,300). Also, cremation niches can be located in areas where traditional burials would not be possible (due to slope or terrain), can be constructed vertically to allow for significantly higher densities than traditional burials allow, and can accommodate multiple urns. For example, the columbaria at Union Cemetery can accommodate the cremated remains of 96 individuals on a footprint the size of four full-size graves. Technological improvements have also increased the variety of cremation services possible, including interments in memorial benches and memorial rocks. Further, the advent of "double depth" burials (i.e. burying one family member on top of another) has also significantly extended the usable years of cemetery land compared to decades ago.[44]

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[42] The only full body interments that occur at Alamo Cemetery are for individuals who purchased plots pre-need.

[43] Capacity includes both niches and in-ground burials. Existing and future cemetery capacity is discussed further in the Infrastructure Needs and Deficiencies section.

[44] BBKUCD offers double depth burials at the Union Cemetery. ALCD reported that it would like to provide double depth burials; however, it has not yet been able to purchase the required equipment, due to financial constraints.

ALCD

Population growth over the next 10 years within ALCD is expected to be low, consistent with the growth rates of the cities of Danville, Lafayette, Walnut Creek, and other cities in central Contra Costa County.[45] At an annual growth rate of one percent, over the next 10 years the population for ALCD is estimated to increase by approximately 17,000. At the existing yearly interment rate of four per 10,000 district residents, this would amount to an additional seven interment services per year by 2019.

BBKUCD

There are various planned and proposed developments within BBKUCD that would increase the population by as many as 34,321 at build-out.[46] At the existing yearly interment rate of 10 per 10,000 district residents, this would amount to an additional 34 interment services per year.

CAPACITY AND INFRASTRUCTURE NEEDS

CEMETERY CAPACITY

Alamo Cemetery

The Alamo Cemetery is located at 130 El Portal, in the Town of Danville. There are approximately 1,400 occupied plots at the cemetery. The cemetery has reached capacity for in-ground burials; however, niches are available for cremated remains. The District reported that there were 18 niches available for purchase, as of November 2009. The District plans to add 370 new niches at the cemetery in FY 09-10. Once these niches are added, the cemetery will have capacity for at least 15 years based on recent niche placement rates and projected population growth.[47]

Lafayette Cemetery

The Lafayette Cemetery is located at 3285 Mount Diablo Boulevard, in the City of Lafayette. There are approximately 2,200 occupied plots at the cemetery. The District reported that there were 500 regular plots and 12 niches available for purchase, as of November 2009. The District plans to add 160 new niches at the cemetery in FY 09-10.[48] With the additional niches at the cemetery, the

[45] Contra Costa LAFCO, *Central County Sub-Regional MSR*, 2009, p. X-31.

[46] Population estimate is based on the 2009 population per household for the City of Oakley (3.2) and unincorporated Contra Costa County (2.7), according to the Department of Finance. The City of Oakley's East Cypress Corridor Specific Plan would add up to 5,219 new units, in addition to a possible 6,000 units on the Cecchini Ranch property adjacent to Discovery Bay, and 495 units through the Delta Coves subdivision on Bethel Island.

[47] Niche capacity of 15 years is a highly conservative estimate. The reason being that it assumes that all niches are occupied by a single urn, while up to two urns can occupy a niche. For that reason, the District could have niche capacity at Alamo Cemetery for potentially up to 30 years.

[48] As of April 2010, ALCD reported that it planned to begin construction of the additional niches at Lafayette Cemetery and Alamo Cemetery in June 2010.

facility will have capacity for at least eight years of niche placements, and at least 18 years of single-body in-ground burials, based on recent niche placement rates and projected population growth. It should be noted that these capacity estimates are highly conservative, because if customers opt for in-ground cremation burial (as opposed to an in-ground full body burial), up to six urns can be buried in a single plot, significantly extending the usable life of the cemetery.

No short-term capacity issues were identified for ALCD, assuming that planned additions of niches are completed in FY 09-10. The District has taken a proactive approach in expanding capacity by continuing to add interment niches at both cemetery facilities as the number of available in-ground burial lots has decreased. Because niches can be constructed vertically along walls and walkways, and because a single niche can accommodate up to two urns, much higher densities can be achieved with cremation interments than traditional full body in-ground burials.

It is important, however, that the District plan for long-term facility needs, including acquiring and developing new cemetery facilities. Public cemetery districts have the legal responsibility to continue providing cemetery services by obtaining and developing more land as existing facilities reach capacity. ALCD reported that adding niches is the only method of increasing capacity currently available to the district, due to the high cost of land within the district, and limited finances.

Union Cemetery

The Union Cemetery is located at 11545 Brentwood Boulevard, between the City of Brentwood and the unincorporated community of Byron. The District reported that it has records of 6,010 occupied plots at the cemetery.[49] There were approximately 1,000 regular plots and 325 niches available for purchase as of November 2009. The District has also reserved space and poured concrete foundations to accommodate an additional 480 new niches on existing cemetery as the need arises. The District also reported that there is capacity for an additional 1,000 plots in the undeveloped portion of the cemetery. Based on the amount of available land for in-ground burials, and the number of available and planned niches, cemetery capacity is not a concern for the District in the short-term. The Union Cemetery has capacity for at least 31 years of single-body in-ground burials, and 18 years of niche placements, based on recent niche placement rates and projected service demand rates at build-out.[50] If current service demand is used to forecast capacity, there is at least 46 years remaining for single-body in-ground burials, and 26 years of niche placements.

[49] The number of occupied plots is based on District records since 1928. The District reported that there is an unknown number of additional burials that took place between 1878 and 1928 in the older portions of the cemetery that the District does not have records of. A goal of the District is to digitize and map the records on hand, in order to give a more comprehensive picture of historic burials. During the 50 years that the cemetery operated before the District was formed, families kept their own burial records, and many grave markers were made out of wood and disintegrated without proper care. Also, the District reported that from the 1920s into the 1960s, cremation burials and burials of children under the age of three were considered "non-persons," and very few records were kept of these burials.

[50] Union Cemetery capacity is highly understated as well, because each niche can accommodate the cremated remains of up to two individuals, and because the District also offers double-depth in-ground burials, up to two full bodies can be buried per plot. In addition, for in-ground cremation burial, the District allows three urns per plot on a standard grave site, or two urns per plot in a cremation grave, which is about half the size of a standard plot. The useable life of the cemetery may be extended well beyond the capacities stated in this report, due to the potential for significantly higher burial densities.

INFRASTRUCTURE NEEDS

ALCD

In terms of infrastructure needs, the District reported that the asphalt pathways at both cemeteries are in need of rehabilitation; however, both facilities are generally in good condition. The District also reported it would like to provide double depth burials; however, it has not yet been able to purchase the required equipment, due to financial constraints.[51]

The LAFCO site visit did not identify any major infrastructure deficiencies.

BBKUCD

The District reported that the cemetery is in good condition, and that there are no significant infrastructure needs. The LAFCO site visit did not identify any major infrastructure deficiencies.

Figure 4-3 Niches at Lafayette Cemetery (Left) and Union Cemetery (Right)

SERVICE ADEQUACY

CEMETERY MAINTENANCE

Both ALCD and BBKUCD provide cemetery maintenance services on a year-round basis, through three full-time staff positions. In addition, BBKUCD employs one to two additional full-time caretakers on a seasonal basis.

The LAFCO site visits did not identify any significant maintenance needs at the cemetery facilities.

[51] CALOSHA requires special shoring equipment to hold up the walls of the grave, to protect the grave digger.

MANAGEMENT

While public sector management standards do vary depending on the size and scope of the organization, there are minimum standards. Well-managed organizations evaluate employees annually, prepare a budget before the beginning of the fiscal year, conduct periodic financial audits to safeguard the public trust, maintain relatively current financial records, periodically evaluate rates and fees, plan and budget for capital needs, and conduct advance planning for future growth.

An evaluation of the adequacy of management practices is shown in Table 4-3. The first four indicators are self-explanatory. Adequate evaluation of rates means updating fees with reasonable frequency. Adequate capital planning involves a multi-year capital improvement plan or comparable planning effort for cemetery needs and, if relevant, expansion. Compliance is the degree to which cemetery providers conduct operations in accordance with their principal act.

Table 4-2: Cemetery Management Practices

	ALCD	BBKUCD
Management Practices		
Evaluate employees annually	A	A
Prepare timely budget	A	A
Periodic financial audits	A	A
Current financial records	A	A
Evaluation of rates	A	A
Capital planning	I	I

Key:
A = Practiced adequately
I = Practiced but improvement needed
N = Not practiced or did not occur

Both ALCD and BBKUCD generally exhibit the characteristics of well-managed local government agencies. Both districts evaluate employees on an annual basis, prepare timely budgets, conduct annual financial audits, maintain current financial records, and routinely evaluate rates.

The only practice that both districts could improve upon would be to create and maintain a written capital improvement plan for cemetery facility improvements and expansion. Currently, both districts perform significant capital planning on a year-to-year basis through the adoption of an annual budget. BBKUCD has looked into acquiring new land for additional cemetery capacity, but has not created a written planning document. ALCD faces significant planning needs as in-ground cemetery capacity continues to decrease. The districts are obligated to plan for, acquire and develop additional cemetery facilities as existing facilities reach capacity.[52] A written multi-year capital improvement planning document could help the districts better forecast and plan capital needs, and would improve accountability.

Both districts are in compliance with the principal act in regard to non-resident fees and endowment fees for perpetual care of the cemetery facilities.

ALCD reported that a management difficulty that the district faces is in determining residency status for some prospective customers, due to the fact that the boundaries of ALCD do not include the entirety of the cities within the district. The boundaries of ALCD include only the southwestern portion of the City of Walnut Creek and the eastern portion of the City of San Ramon, and exclude two northern portions of the City of Lafayette and a southwestern portion of the Town of Danville.

[52] The Legislature defined such districts' mission as providing cost-effective interments to their constituents (Health & Safety Code §9001(b)). Further the law requires these districts' boards to provide adequate cemetery space for the foreseeable future (Health & Safety Code §9061(c)(3)) due to their practice of allowing burials of non-residents (i.e., non-taxpayers).

Furthermore, the Board of Equalization (BOE) map that the District uses to determine residency for interment purposes was found to be inconsistent with the LAFCO map of the district in the unincorporated Walden/Contra Costa Centre area. Hence, a recommendation of this MSR is for ALCD to collaborate with LAFCO staff and County GIS to verify that the appropriate boundary is being used to determine residency.

Both districts are members of the California Association of Public Cemeteries, the California Special Districts Association, and the Contra Costa chapter of the Special Districts Association. BBKUCD is also a member of the Public Cemetery Alliance (PCA).[53]

LOCAL ACCOUNTABILITY AND GOVERNANCE

Accountability of a governing body is signified by a combination of several indicators. The indicators chosen here are limited to: 1) constituent interest in the agency's activities as indicated by vacancies on the governing body, 2) agency efforts to engage and educate constituents through outreach activities in addition to legally required activities such as agenda posting and public meetings, and 3) transparency of the agency as indicated by cooperation with the MSR process and information disclosure.

Neither ALCD nor BBKUCD have vacancies on the governing body; however, ALCD did have a vacancy on the board for approximately one year, before it was filled in December 2009. In terms of constituent outreach, ALCD does not perform any activities beyond what is legally required in terms of posting agendas and notifying public meetings. BBKUCD constituent outreach activities include posting information in local publications of the cemetery as a place of historical significance, and writing letters to the editor thanking volunteer groups for participating in cleanup activities at the cemetery. Both agencies demonstrated full accountability in terms of disclosure of information and cooperation with LAFCO interview and document requests.

SHARED FACILITIES

FACILITY SHARING STATUS

Neither ALCD nor BBKUCD is presently engaged in facility sharing, including sharing with private service providers.

OPPORTUNITIES

Given the nature of the services provided by the districts, and that the agencies are not contiguous, there are limited opportunities for facility sharing. No opportunities for facility sharing were identified by the agencies. BBKUCD reported that approximately 15 years ago it looked into collaborating with the City of Brentwood for contract mowing services, but it was determined to be

[53] BBKUCD obtains insurance through PCA. PCA and the Golden State Risk Management Authority collaborate to provide risk management services to many public cemetery districts in California.

economically infeasible. No opportunities for collaboration with private cemetery providers were identified.

REGIONAL COLLABORATION

Cemetery providers sometimes collaborate on a local basis with community groups and family members for clean-up and maintenance activities, albeit on an informal basis. No opportunities for regional collaboration were identified; however, both districts are active in regional associations, including the California Association of Public Cemeteries, the California Special Districts Association and the Contra Costa County Chapter of the California Special Districts Association.

FINANCING

The financial ability of agencies to provide services is affected by available financing sources and financing constraints, as well as management practices. This section discusses the major financing constraints faced by cemetery service providers and identifies the revenue sources currently available to the service providers. Finally, it assesses the financial ability of agencies to provide services.

FINANCING OPERATIONS

Financing sources for cemetery services include property taxes, fees for interment services, and investment income. The fees for service apply to plot and niche purchases and other interment accessories. These fees, in addition to the property taxes, may be used for cemetery care and district operations. The districts may also use interest income from the endowment care fund for cemetery care.

Fees For Service

Fees for service generate approximately 32 percent of total revenues in ALCD, and 34 percent in BBKUCD. Fees for service charged by ALCD and BBKUCD are shown in Table 4-3.

Table 4-3: Fees For Service, 2009

ALCD	
Regular Burial	$3,950
Single Niche	$1,200
BBKUCD	
Regular Burial, Lot D	$3,343
Regular Burial, Lot E	$3,568
Regular Burial, Lot F	$4,703
Single Niche	$1,253

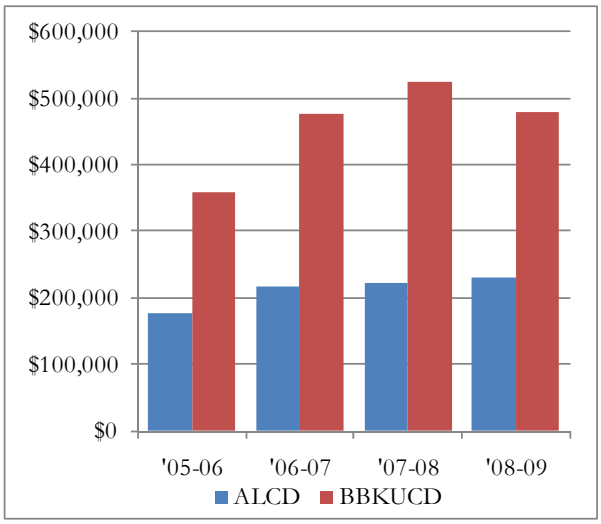
For district residents, ALCD charges $3,950 for regular in-ground burial services and $1,200 for a single cremation niche, including all fees (endowment care, opening and closing, burial liner, etc.). ALCD also charges a non-resident fee of $600.

BBKUCD charges between $3,343 and $4,703 for regular in-ground burial services, depending on the location of the lot, and $1,253 for a cremation niche, inclusive of all fees. BBKUCD charges a non-resident fee of $500 for an in-ground burial, $75 for an in-ground cremation burial and $85 for a niche interment.

Both districts charge additional fees for services on a Saturday, Sunday or holiday.

Property Taxes

Figure 4-4: Property Tax Revenue, FY 05-06 to FY 08-09



For both districts, property taxes consist of approximately 65 percent of total revenues received by the district. Figure 4-4 depicts the total amount of property tax received by ALCD and BBKUCD from FY 05-06 to FY 08-09.

Property tax revenue has increased by 30 percent over the four year span for ALCD, and by 34 percent for BBKUCD; however, BBKUCD saw a drop in property tax revenue of approximately nine percent from FY 07-08 to FY 08-09. BBKUCD attributed the increase in property tax revenue over the period to the significant amount of residential development that occurred in eastern Contra Costa County.

Proposition 1A

Due to the State budget crisis, in July 2009, the State legislature voted to suspend Proposition 1A, which ensures local property tax and sales tax revenues remain with the counties, cities and special districts.[54] Consequently, all local agencies will be required to loan eight percent of apportioned property tax revenues to the State with repayment plus interest by June 30, 2013. To mitigate the impact of the loss of revenues on the local agencies, the Proposition 1A Securitization Program enables local agencies to sell their Proposition 1A Receivables for cash proceeds to be paid in two installments in January and May 2010. Both ALCD and BBKUCD passed resolutions to participate in the securitization program. The bond sales were successful, and the districts will receive eight percent of apportioned property tax revenues loaned to the State in FY 09-10.

[54] Proposition 1A was passed by voters in 2004. It prohibits the State from reducing local government property and sales tax proceeds. The proposition may be suspended if the Governor declares a fiscal necessity and two-thirds of the State legislature approve the suspension.

MAINTENANCE COSTS

Figure 4-5: Maintenance Cost per Developed Acre

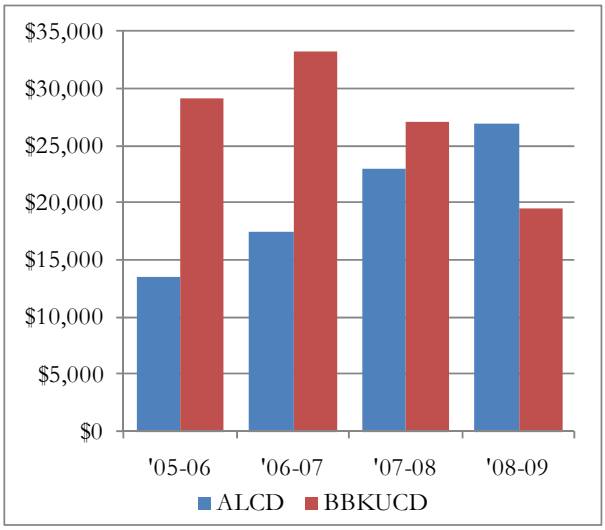


Figure 4-5 depicts the level of maintenance expenditures per developed acre of cemetery space from FY 05-06 to FY 08-09. Over the four year span, BBKUCD spent an average of approximately $27,200 per developed acre on cemetery maintenance. Maintenance expenditures for BBKUCD peaked in FY 06-07 at approximately $33,000 per developed acre, and have since fallen by approximately 41 percent to approximately $19,500 per developed acre, due to financing constraints.

ALCD spent an average of approximately $20,200 per developed acre on maintenance activities between FY 05-06 and FY 08-09. Maintenance expenditures per developed acre increased by nearly $13,400, or 77 percent, over the four year span.

Perpetual Care

In accordance with Health and Safety Code §9065, all cemetery districts must create an endowment fund for the perpetual maintenance of the cemetery facilities. The districts are required to collect a minimum endowment care fee for each interment right sold.[55] The principal of the endowment fund may only be used for investment purposes. Any income from those investments may be used for care of cemeteries owned by the district.

Both ALCD and BBKUCD charge endowment fees for burial plots and niches, as shown in Table 4-4. ALCD charges endowment fees that are significantly higher than those required by law. The District reported that the fee was set based on estimated future maintenance costs. BBKUCD charges much lower endowment fees than ALCD, but nonetheless, fees are higher than the minimum amounts required by law. Both ALCD and BBKUCD reported that their endowment care fees may be too low to cover long-term maintenance costs of existing plots. Neither district has conducted a formal review of the adequacy of the endowment care fund to determine if the fund balance will be enough to provide perpetual care to the cemetery facilities once they have reached capacity.

[55] The minimum endowment care fee as defined in Health and Safety Code §8738 is $4.50 a square foot for each grave, $70 for each niche, $220 for each crypt; provided, however, that for companion crypts, there shall be deposited $220 for the first crypt and $110 for each additional crypt.

Table 4-4: Endowment Fees by District

	Endowment Fee	Grave Area (sq. ft.)	Minimum Fee	Difference
ALCD				
Full burial	$350	24	$108	$242
Cremation burial	$250	4	$17	$233
Cremation Niche	$200	NA	$70	$130
BBKUCD				
Full burial (Lot D/E)	$160	24	$108	$52
Full burial (Lot F)	$185	24	$108	$77
Cremation burial	$125	16	$72	$53
Cremation Niche	$125	NA	$70	$55

In 2009, the minimum endowment fees required by the Health and Safety Code were doubled from their previous amounts, after the 2008 *Endowment Care Fund Survey* conducted by the State Cemetery and Funeral Bureau of the Department of Consumer Affairs found that endowment care funds maintained by the 166 licensed private cemeteries in the state were not earning sufficient income.[56] Of the 166 licensed cemeteries, only 13 had sufficient interest income from the endowment care fund to cover their maintenance expenses, and the Bureau concluded that the shortfall indicated that the endowment care funds were grossly underfunded.[57] Minimum endowment care fees were doubled in order to help close the funding gap.

Public cemetery districts subsidize the maintenance shortfall with other funding sources, such as property taxes and operating revenues; however, the California Association of Public Cemeteries (CAPC) cautions districts that they have a responsibility to continue providing cemetery service by acquiring and developing new land as existing facilities reach capacity, and property taxes should not be relied on to continue maintaining old facilities.[58] CAPC recommends that districts review endowment care fees and the endowment care fund balance based on estimated maintenance costs at capacity, in order to assess the adequacy of the current endowment care fee, and update it as necessary.

CAPITAL FINANCING

Capital needs are financed through the same sources as operations: property taxes, charges for service and interest income. Interest income from the endowment fund may not be used to finance capital improvements at the cemetery.

FINANCIAL ABILITY

The most significant financing constraints for cemetery services are legal requirements that limit property taxes and require voter approval of new taxes and tax increases. Finances are additionally constrained due to the State property tax withholding, and a decline in the real estate market, which has dampened property tax revenue, especially in eastern Contra Costa County.

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[56] The total of the endowment care fund balances reported was nearly $822 million for the 166 cemeteries, generating interest income of $28 million per year, a return of approximately 3 percent. Maintenance costs reported for the 166 cemeteries were approximately $93 million, a shortfall of nearly $65 million per year.

[57] SB 1135 Bill Analysis, Senate Floor, May, 22, 2008.

[58] Interview with Dewey Ausmus, Executive Director, California Association of Public Cemetery Districts, January 20, 2010.

BBKUCD reported that its financial ability to provide services has improved in recent years due to the increased amount of residential development within the district. Both Districts reported that the current level of financing is generally sufficient for routine maintenance and regular service provision; however, both districts may encounter difficulty in obtaining and developing new cemetery land if adequate long-term planning is not conducted.

ALCD reported that, in the short term, adding niches is the only option for expanding cemetery capacity. Due to the high cost of land within the district and limited finances, the District has not been able to acquire new cemetery land, and may be unable to serve current and future taxpayers when existing facilities reach capacity. The District reported that it had looked into purchasing land adjoining the Alamo Cemetery, and requested financial assistance from the County and the California Special Districts Association, but no funding source was able to be secured.

ALCD also reported that other more minor capital needs have not been addressed in recent years due to financing constraints.

MSR DETERMINATIONS

This section sets forth recommended findings with respect to the service-related evaluation categories based upon this review of municipal services for Contra Costa County.

LAFCO is required to identify governance options; however, LAFCO is not required to initiate changes and, in many cases, is not empowered to initiate these options.[59] LAFCO is required by the State to act on SOI updates. The Commission may choose to recommend governmental reorganizations to particular agencies in the county, using the spheres of influence as the basis for those recommendations (Government Code §56425 (g)).

PRESENT AND PLANNED CAPACITY OF PUBLIC FACILITIES AND INFRASTRUCTURE NEEDS

1) No short-term capacity issues or infrastructure needs were identified for ALCD or BBKUCD, assuming that planned additions of niches are completed in ALCD. Both ALCD and BBKUCD appear to have sufficient capacity for the next 15-20 years, even accounting for service demand at build-out.
2) ALCD has reached capacity for in-ground burials at Alamo Cemetery, but continues to add capacity for cremation interments as the need arises. ALCD reported that adding niches is the only method of increasing capacity currently available to the district, due to the high cost of land within the district, and limited finances.

[59] LAFCO can initiate SOI changes, along with mergers, consolidations, dissolutions, district formations, and creation of subsidiary districts. LAFCO cannot initiate annexations, detachments, and incorporations.

ADEQUACY OF PUBLIC SERVICES

3) Both cemetery districts provide adequate services given financing levels. Service adequacy could perhaps be improved for both districts by implementing a written multi-year capital improvement plan.

4) It is important that both districts adequately plan for long-term facility needs, including acquiring and developing new cemetery facilities. In fairness to current and future taxpayers, public cemetery districts should continue providing cemetery services by obtaining and developing more land as existing facilities reach capacity.

5) Both districts reported that endowment care fees may be inadequate. It is recommended that both districts conduct a formal review of the adequacy of the endowment care fund to determine if the fund balance will be enough to provide perpetual care to the cemetery facilities once they have reached capacity and adopt appropriate and prudent fees.

GROWTH AND POPULATION PROJECTIONS

6) The population of ALCD is projected to increase by 10 percent, or by approximately 17,000 individuals, over the next 10 years. At the existing interment rate of four per 10,000 district residents, this would amount to an additional seven interment services per year by 2019.

7) Build-out of the various planned and proposed developments within BBKUCD will increase the population by as many as 34,321 individuals. At the existing interment rate of 10 per 10,000 district residents, this would amount to an additional 34 interment services per year

FINANCIAL ABILITY OF AGENCIES TO PROVIDE SERVICES

8) Property taxes are the primary revenue source for the public cemetery districts in Contra Costa County, consisting of approximately 65 percent of all revenues. Fees for service generate approximately 32 percent of total revenues in ALCD, and 34 percent in BBKUCD.

9) BBKUCD reported that its financial ability to provide services has improved in recent years due to the increased amount of residential development within the district.

10) Both districts reported that their endowment care fees may be too low to cover long-term maintenance costs of existing plots. ALCD appears to lack the financial ability to continue expanding facilities, and may be unable to serve current and future taxpayers. ALCD reported that some capital needs have not been addressed in recent years due to financing constraints.

STATUS OF, AND OPPORTUNITIES FOR, SHARED FACILITIES

11) Neither ALCD nor BBKUCD is presently engaged in facility sharing, and no facility sharing opportunities were identified due to the fact that the agencies are not contiguous.

12) No opportunities for facility sharing with private cemetery providers were identified.

ACCOUNTABILITY FOR COMMUNITY SERVICE NEEDS

13) Cemetery service providers have a lower level of accountability in that governing bodies are appointed, voters do not have opportunities to choose among candidates for their governing body members, and providers generally conduct minimal constituent outreach activities; however, both ALCD and BBKUCD demonstrated accountability during the MSR process.

GOVERNMENTAL STRUCTURE AND OPERATIONAL EFFICIENCIES

Both districts identified SOI goals that would improve operational efficiencies and local accountability.

ALCD reported that determining residency of prospective customers can be difficult and time-consuming, due to the fact that district boundaries include only portions of various cities. In addition, the map that the District has historically used to determine residency appears incorrect in the area where the unincorporated Walden/Contra Costa Centre area borders the City of Walnut Creek. The District indicated that expanding district boundaries to include all incorporated areas currently within the district, in addition to clarifying the district boundary in the Walden/Contra Costa Centre area, would streamline the process of determining residency and improve local accountability by making the boundaries of the district clear to residents.

Similarly, the City of Oakley is partially located within the bounds of BBKUCD. The District reported that an improvement would be to expand the District's boundaries to include the entire City of Oakley area, or reduce the District's boundaries to exclude the entire City of Oakley. The District reported that it is not desirable to have some residents of the City eligible for interment and others not.

Before any boundary changes can be pursued, the districts must determine (a) whether a property tax transfer agreement could be reached with the affected local agencies; (b) what fee for service would have to be charged in the zones of the district not contributing property tax to sufficiently offset the foregone revenue if no property tax transfer agreement can be reached; and (c) whether the districts have sufficient short-term capacity to accommodate a significantly larger service area with or without additional property tax. Furthermore, LAFCO may wish to require that the District conduct a formal study as to the adequacy of the endowment care fee, and the necessary endowment fund balance to ensure perpetual care of the cemetery facilities, before an SOI amendment is approved, or boundary changes are pursued.

5. AMBROSE RECREATION AND PARK DISTRICT

Ambrose Recreation and Park District (ARPD) provides recreation and park services to the unincorporated community of Bay Point and to a portion of the western City of Pittsburg area.

AGENCY OVERVIEW

FORMATION AND BOUNDARY

ARPD was formed on September 15, 1946 as an independent special district.[60] The District was formed to provide recreation and park services to the Ambrose Park and Ambrose Community Center, in the unincorporated community of Bay Point.

The principal act that governs the District is the Recreation and Park District Law.[61] The principal act empowers Recreation and Park Districts to 1) organize, promote, conduct, and advertise programs of community recreation, including, but not limited to, parks and open space, parking, transportation, and other related services that improve the community's quality of life, 2) establish systems of recreation and recreation facilities, including, but not limited to, parks and open space, and 3) acquire, construct, improve, maintain, and operate recreation facilities, including, but not limited to, parks and open space, both inside and beyond the district's boundaries.[62] Districts must apply and obtain LAFCO approval to exercise latent powers, that is, those services authorized by the principal act but not provided by the district by the end of 2000.[63]

The District's boundary is located entirely within Contra Costa County, extending south from the Contra Costa-Solano county line to the northeastern city limits of the City of Concord, including a portion of the City of Pittsburg and the unincorporated community of Bay Point, as shown in Map 5-1.[64] The boundaries encompass approximately 9.3 square miles, or approximately 5,950 acres. Contra Costa is the principal county and Contra Costa LAFCO has jurisdiction.

[60] Board of Equalization official date.

[61] California Public Resources Code §5780-5791

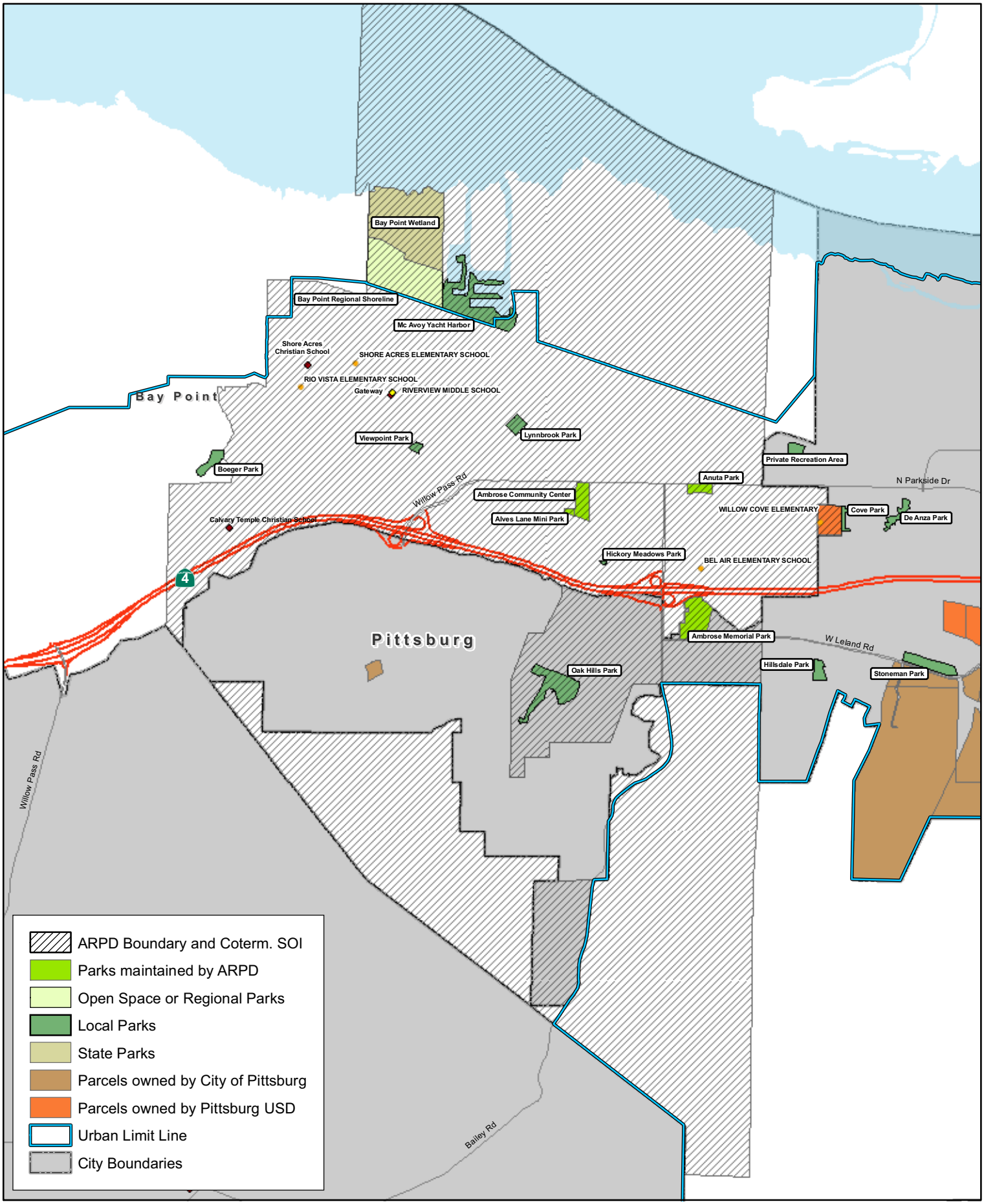
[62] California Public Resources Code §5786.

[63] Government Code §56824.10.

[64] Annexation of Ambrose park to the City of Pittsburg was approved by LAFCO in 2008, by Resolution No. 07-21.

Map 5-1

Ambrose Rec and Park District, Coterminous SOI, and West Pittsburg Parks and Schools



Map created 3/24/2010
by Contra Costa County Community Development, GIS Group
651 Pine Street, 4th Floor North Wing, Martinez, CA 94553-0095
37:59:48.455N 122:06:35.384W

This map was created by the Contra Costa County Community Development Department with data from the Contra Costa County GIS Program. Some base data, primarily City Limits, is derived from the CA State Board of Equalization's tax rate areas. While obligated to use this data the County assumes no responsibility for its accuracy. This map contains copyrighted information and may not be altered. It may be reproduced in its current state if the source is cited. Users of this map agree to read and accept the County of Contra Costa disclaimer of liability for geographic information.

0 0.125 0.25 0.5 Miles

The District was interviewed by LAFCO as part of the 2003-04 MSR cycle; however, LAFCO minutes from June 9, 2004 indicate that the MSR for the District was deferred and an SOI update was never initiated. LAFCO staff assume that the existing SOI is coterminous with ARPD bounds based on previous SOI amendments, but no SOI adoption resolution is contained in the LAFCO records.[65]

Boundary History

There have been 10 boundary change actions for ARPD since formation in 1946. Of the 10 actions, two were solely annexations, five were solely detachments, and three were reorganizations that both annexed and detached territory from the District.

Table 5-1: ARPD Boundary History

Project Name	LAFCO Reso./Date	Change Type	Acres[1]	Recording Agency[2]
Formation	9/15/1946	Formation	NA	BOE
Pre-LAFCO Annexation	8/5/1952	Annex	NA	BOE
Pre-LAFCO Reorganization	10/28/1960	Annex/Detach	NA	BOE
Naval Weapons Station/City of Concord Reorganization	7/1/1970	Annex/Detach	NA	Both
Baker West #2 and Challenge Reorganization	5/2/1973	Annex Detach	11.6 11.2	Both
Avila Road Reorganization	92-12	Detach	129.5	Both
California Skyline Annexation	93-24	Annex	63.5	Both
Smith Reorganization	96-8	Detach	101.9	Both
Oak Hills South Reorganization	98-20	Detach	45.4	Both
Oak Hills South Reorganization	01-16	Detach	1.6	Both
Oak Hills South Reorganization	02-42	Detach	1.1	Both

Notes:
(1) NA indicates that acreage is not available in the LAFCO records.
(2) Recording agency indicates whether Contra Costa LAFCO or the Board of Equalitzation maintains records of the particular boundary change.

[65] The Executive Officer's Report attached to LAFCO Resolution No. 93-24 states that "this proposal includes an SOI amendment so that the annexation boundaries are coterminous with the sphere boundaries."

LOCAL ACCOUNTABILITY AND GOVERNANCE

The District is governed by a five-member board. For contested elections, board members are elected at large to staggered four-year terms. The last contested election for a board seat occurred in 2008. ARPD board members receive compensation of $100 per meeting.

The District's constituent outreach activities include advertising meetings and special events on its website, in the local newspaper, through postings at district facilities, in Bay Point Municipal Advisory Council newsletters, and in mailings with utility bills.

With regard to customer service, complaints may be submitted verbally at District meetings, or by telephone, mail or email to the District. Within FY 08-09 there were approximately four complaints filed directly with the District. Other complaints to the district were made during public comment at board meetings. Complaints most often related to maintenance issues.

Table 5-2: ARPD Governing Body

Ambrose Recreation and Park District				
Governing Body				
	Name	**Position**	**Began Serving**	**Term Expires**
Members	Mae Ramos Cendaña	Director	2006	2010
	Judith Dawson	Director	2006	2010
	Eva Garcia	Director	2004	2012
	Steve Hoagland	Director	2006	2010
	Gloria Magleby	Director	2000	2012
Manner of Selection	Elections at large			
Length of Term	Four years			
Meetings	Date: Second Thursday of the month at 6:30 p.m.		Location: 3105 Willow Pass Road, Bay Point, CA 94565	
Agenda Distribution	Posted online and at district office			
Minutes Distribution	Posted online and by request at district office			
Contact				
Contact	General Manager			
Mailing Address	3105 Willow Pass Road, Bay Point, CA 94565			
Email/Website	http://www.ambroserec.org/			

The District demonstrated full accountability in its disclosure of information and cooperation with LAFCO. The agency responded to LAFCO's written questionnaires and cooperated with LAFCO interview and document requests.

SERVICE DEMAND AND GROWTH

The District bounds encompass single family and multiple family housing, limited commercial and industrial areas, and the Pittsburg/Bay Point BART Station. Highway 4 bisects the district in an east-west fashion, and provides the primary source of vehicle circulation.

The District considers its customer base to be landowners and residents within the District. There are approximately 23,000 residents of the District, according to 2009 LAFCO estimates. The

District's population density was 2,473 per square mile, compared with the 2009 countywide density of 1,473. Population is expected to increase at a rate similar to the City of Pittsburg, or in other words, at an annual rate of approximately 1.6 percent.[66] The estimated population of the District by 2025 is 29,611.

The western portion of the City of Pittsburg has experienced recent growth, and additional growth is anticipated within the City in the future. Due to the unusual configuration of the district's boundaries, with portions of the City of Pittsburg excluded from ARPD, not all recent growth within the western portion of the City of Pittsburg has occurred in ARPD boundaries. Planned and proposed subdivisions within the western portion of the City of Pittsburg include Alves Ranch (530 total units), Bailey Estates (249 units), Lawlor Estates (50 units), Vista del Mar (540 units), and the San Marco development (2,938 units). Although all of these planned and proposed developments are located within the "outside boundary" of ARPD, only Bailey Estates and Lawlor Estates are actually within ARPD bounds. All other planned and proposed developments are located in the "hole" within ARPD—within the City of Pittsburg but not technically part of the District. Build-out of the Bailey Estates and Lawlor Estates subdivisions would add approximately 936 residents to the District.[67] ARPD did not identify any particular growth concerns, and reported that growth within the City of Pittsburg thus far has not had a noticeable effect on service demand within ARPD.

The District is not a land use authority, and does not hold primary responsibility for implementing growth strategies.

MANAGEMENT

The District employs nine full-time staff positions (an administrative assistant, a receptionist, five park maintenance workers, a recreation supervisor, and a teen center coordinator), one full-time general manager, one part-time recreation coordinator, one part-time staff member for in-house recreation programming, three part-time daily custodians, and four part-time weekend security guards. The staff report to the general manager, who reports to the Board at monthly meetings. The District evaluates employee performance on an annual basis. The general manager conducts workload monitoring on a routine basis through direct oversight and evaluating maintenance standards such as the number of park acres per maintenance worker. The District monitors performance through monthly park inspections, bi-annual program evaluations, budget reviews (monthly by the general manager and bi-annually by the board), safety meetings (every two months), and the annual "State of the District" report.

The District annually prepares audited financial statements. The most recent audited financial statement provided to LAFCO by the District was for FY 07-08.

District planning efforts include an annual budget, the 2009 Ambrose Park Master Plan (in conjunction with the City of Pittsburg), and the annual "State of the District" report. The District does not prepare a separate capital improvement plan; however, capital improvement planning is

[66] Association of Bay Area Governments, Population Projections, 2009.

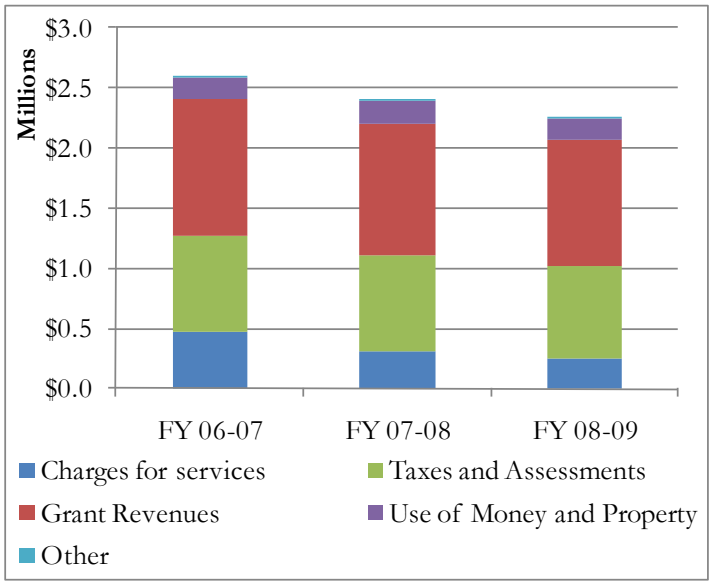
[67] Assuming population densities comparable to the existing household population for the City of Pittsburg (3.13), according to the Department of Finance.

included in the "State of the District" report, as well as the Ambrose Park Master Plan. ARPD participates in both the California Association of Recreation & Park Districts (CARPD) and the California Park & Recreation Society (CPRS) for insurance, training, sharing of knowledge and legislative support.

FINANCING

The District's financial ability to provide services is constrained by available revenues and legal constraints on revenues. The District reported that its financial ability to provide existing services is adequate; however, financing constraints have prevented the District from enhancing service levels by expanding recreation offerings, improving facilities and increasing staffing levels.

Figure 5-1: ARPD Revenues, FY 06-07 through FY 08-09



The District received approximately $2.4 million in revenues in FY 07-08. ARPD relies primarily on grant revenues and taxes and assessments to fund services. Grant revenues generated 46 percent of operating revenues in FY 07-08, and taxes and assessments generated 33 percent. The District also received 13 percent of revenue from charges for service and seven percent of revenues from the use of money and property.[68] Total revenues decreased by nearly 11 percent from FY 06-07 to FY 08-09.

Total expenditures for FY 07-08 were approximately $2.2 million, 61 percent of which were for salaries, wages and benefits, 28 percent for services and supplies, and 10 percent for capital expenses. The District expended $448,650 on park maintenance services in FY 07-08.

The District had approximately $56,143 in long-term debt at the end of FY 07-08. The long-term debt consisted of accrued sick leave and vacation pay for ARPD staff.

The District's unrestricted net assets at the end of FY 07-08 were approximately $804,000. This amounted to 36 percent of the District's expenses in FY 07-08. The District does not have a formal policy on target financial reserves.

Facility rental income is a significant source of funding for the District. The District rents space in the Ambrose Community Center to the County Employment and Human Services Department for $6,893 per month ($82,716 per year). Other facility rentals average $70,000 to $80,000 per year. In addition, the District earns approximately $20,000 to $25,000 per year in program income from

[68] Grant revenues consist of funding for after school and teen center programs that are passed through to ARPD by the Mt. Diablo Unified School District, charges for service consist of facility rentals by the County at the Ambrose Community Center, and use of money and property consist of private facility rentals and programming revenue from private recreation classes.

recreation classes.[69] The District charges non-residents more for facility rentals than residents; however, both residents and non-residents are charged the same for recreation programs and classes. Recreation programs and classes are conducted by independent contractors using district facilities. The District charges instructors $90 per month for the use of district facilities for classes offered once a week, and $180 per month for classes offered twice per week.

ARPD has not been able to offer recreation programs directly due to financing constraints related to staffing, and a lack of sufficient indoor facilities to create and run programs. The District identified the expansion of recreation program offerings provided by the District as a short-term goal. The introduction of a significant recreation program, including a functional pool facility and aquatics program, would improve the service levels offered by the District to the community. The District is in the process of pursuing grants to fund additional part-time employees for recreation programming purposes.

PARKS AND RECREATION

NATURE AND EXTENT

ARPD provides park and recreation facility operation and maintenance. Park maintenance services within the District are provided directly, with the exception of mowing, which is performed by contract. The District maintains four district-owned park facilities, consisting of approximately 25 acres.

Recreation programs and classes offered at the Ambrose Community Center are by independent contractors that rent space from the District. Recreation classes offered include adult ballroom dancing, aerobics, children's ballet, cheerleading, and self-defense. District facilities available for rent by the public include a conference room, board room, auditorium with kitchen and patio, dining room with kitchen, weight room, computer lab, athletic fields, and the Ambrose Park pool.

The District estimated that yearly recreation attendance is approximately 58,920, or roughly 2.6 attendees per District resident per year. Approximately 27 percent of this amount is from facility rentals for private parties, 31 percent in aerobics and fitness classes, 12 percent is from youth cheerleading, eight percent from karate and self defense classes, eight percent from teen center activities, seven percent from Kids in Motion classes, and seven percent from weight room attendance.[70]

The District provides after school programs at five local schools, in cooperation with the Mt. Diablo Unified School District. Included in the program is an off-site garden education program and field trips. The District provides employment and human resources for approximately 75 to 80 part-time employees associated with the after school programs, with ARPD funding 20 percent of the cost and the school district funding the remaining 80 percent with grant money. Also funded by

[69] ARPD, *State of the District: June 11, 2009*, p.2.

[70] Recreation attendance was estimated based on typical class attendance multiplied by the number of times the class is offered per week or month. The District has not historically tracked recreation attendance due to the fact that recreation classes are provided by independent contractors that pay fees to the District irrespective of attendance.

grants is a teen program, with daily activities held in the Ambrose Community Center, in addition to field trips and community event participation. The teen program is performed by contract with the County.

LOCATION

ARPD provides services to four district-owned parks and related facilities, including the Ambrose Community Center, within its boundary area. Non-residents may use park facilities on a drop-in basis, but must pay a non-resident fee for facility rentals. Non-residents are not charged higher fees to participate in recreation classes.

INFRASTRUCTURE

Ambrose Park was originally dedicated in 1946. The District reported that the park is currently in fair condition; however, significant upgrades are needed. The 2009 Ambrose Park Master Plan identified $10 to $12 million in renovations for the park to achieve its full potential. Currently, the pool and related facilities, tennis courts, bocce ball court and basketball court are all closed and in a state of disrepair. Other existing areas of the park, while still open for use, are in need of improvements. As of FY 09-10 the District had $1.7 million to begin the first phase of rehabilitation, including approximately $1.13 million in Measure WW funds approved by EBRPD.[71]

The District has also identified several issues at the Ambrose Community Center that require funding and future improvements, including new exterior doors around the building, renovation of restrooms, new plumbing, kitchen improvements, and heating and air conditioning improvements.[72] The District also identified the need of a full-time custodian for the community center.

Generally, there is a lack of neighborhood park space within the District and the immediate vicinity. The District identified larger and more concentrated park space as a need for the District. In terms of district-owned and maintained parks, there are approximately 1.1 acres of parkland per 1,000 district residents. County-owned and maintained neighborhood parks within ARPD include Lynbrook Park (four acres), Boeger Park (one-half acre), Hickory Meadows Park (one-third acre), and Viewpointe (Lehman) Park (one-third acre). Neighborhood parks owned and maintained by the City of Pittsburg in the vicinity of ARPD include Oak Hills Park (five acres within ARPD), California Seasons Park (2.5 acres adjacent to ARPD), De Anza Park (3.5 acres adjacent to ARPD), Hillsdale Park (3.5 acres adjacent to ARPD), and Larry Lasater Park (three acres in the San Marco subdivision, within the outside boundary of ARPD). Including all neighborhood parkland within the District and the immediate vicinity (including District-owned, County-owned and City-owned neighborhood parks), there are approximately 2.1 acres of neighborhood parkland per 1,000 district residents. The County General Plan establishes a target of 2.5 acres of neighborhood park facilities per 1,000 population.[73] In order to meet the County General Plan goal, approximately 10 acres of additional neighborhood parkland are needed within ARPD and the immediate vicinity. Future

[71] As of February 2010, no Measure WW funds had yet been expended within the District.

[72] ARPD, *State of the District: June 11, 2009*, p. 4.

[73] Contra Costa County, *General Plan 2005-2020*, 2005, p. 9-17.

parkland sites associated with the Bailey Estates (within ARPD) and San Marco subdivisions (adjacent to ARPD) will increase the amount of parkland available to ARPD residents.

In terms of opportunities for shared facilities, the District identified that it will explore community resources and other options for indoor offsite locations for recreation programs and activities, including increased collaboration with the school district. The District also reported that it plans to create new programs which can be held outdoors in the parks and outdoor facilities of the District, in order to maximize the number of recreation offerings. Current facility sharing practices include the use of school facilities for the after school program, and partnership with the City of Pittsburg for improvements at Ambrose Park.[74] ARPD had previously maintained County-owned park facilities by joint agency agreement; however, this agreement was terminated by the County last year.

In terms of inter-agency collaboration, the District reported that in the past it has worked with the East Bay Regional Park District on common issues relating to the Bay Point waterfront and trails, although no collaborative projects are currently underway.

[74] Annexation of Ambrose Park to the City of Pittsburg was approved by LAFCO in 2008, by Resolution No. 07-21. The City of Pittsburg set aside $600,000 for planning and construction of the Ambrose Park Project. As of the drafting of this report, approximately $120,000 had been spent on planning expenses. ARPD reported that the City is involved in plan review and fiscal control of City funds. No improvements to Ambrose Park have yet been made.

Table 5-3: ARPD Park Service Profile

ARPD Park and Recreation Service Adequacy and Facilities						
Service Configuration						
Park Maintenance	Direct	Recreation Programming			By Contract	
Service Adequacy[1]						
Maintained Park Acres	24.7	Maintained Park Acres per 1,000[3]			1.1	
Active Parkland	20.7	Active Parkland per 1,000			0.9	
Passive Parkland	4.0	Passive Parkland per 1,000			0.2	
Recreation Attendance[2]	58,920	Recreation Attendance per Resident			2.6	
Recreation Cost per Resident	NA	Park Maintenance Cost per Acre			$16,874	
Recreation Facilities and Parks						
Name	**Location**	**Property Owner**	**Park Type**	**Facilities**	**Condition**	**Acres**
Alves Park	93 Alves Ln., Bay Point	ARPD	Passive	Picnic and BBQ	Good	1.0
Ambrose Community Center and Park	3105 Willow Pass Rd., Bay Point	ARPD	Active	Community center, baseball fields, playground, outdoor basketball	Fair	7.5
Ambrose Park	125 Memorial Way, Bay Point	ARPD	Active	Playground, picnic, BBQ, restrooms and sports field. Pool, tennis courts and basketball court are currently closed	Fair	13.2
Anuta Park	2485 Willow Pass Rd., Bay Point	ARPD	Passive	Playground, gazebo, drop-in soccer field	Good	3.0

Notes:
(1) Active parkland consists of developed parkland with active recreation programming and sports facilities, such as active ball courts (e.g., basketball or tennis), delineated sports fields (e.g., soccer, baseball, softball), aquatic facilities, gymnasiums, etc. Passive parkland consists of developed or undeveloped parkland containing trails, walkways, cultural or scenic resources, open fields, picnic tables/shelter, tot lots, etc., but not containing facilities used for active recreation programming.
(2) Recreation attendace estimated using average class attendance multiplied by the number of class meetings per year. Also included in recreation attendance is private facility rentals consisting of approximately 15,480 attendees.
(3) Acres per 1,000 population based on District-maintained neighborhood parkland only.

Figure 5-2: Ambrose Community Center

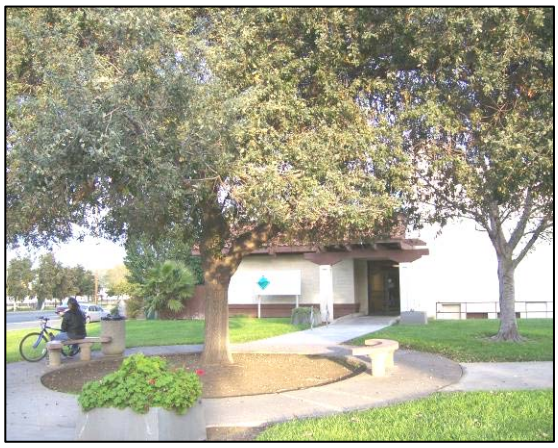


Figure 5-3: Ambrose Park

GOVERNANCE ALTERNATIVES

Governance alternatives for ARPD pertain largely to the unusual configuration of the district's boundaries with relation to the City of Pittsburg. The boundaries of ARPD include the unincorporated community of Bay Point, but also portions of the City of Pittsburg (approximately 528 acres). The City of Pittsburg overlaps ARPD in three general areas: 1) at the nearly 12-acre Willow Cove Elementary School site (north of Hanlon Way), 2) in approximately 412 acres north and south of West Leland Road, south of SR 4, and 3) in approximately 104 acres west of Bailey Road, in the southernmost portion of West Pittsburg.

In areas were ARPD boundaries overlap City boundaries (e.g., along Bailey Road and West Leland Road, south of SR 4) there would appear to be a duplication of services, as both ARPD and the City of Pittsburg provide park and recreation services. Other areas currently within the city limits were detached from ARPD upon annexation to the City, creating a large "hole" within the boundary of ARPD south of SR 4.

The short-term service area for ARPD is concentrated north of SR 4. All park facilities maintained by ARPD, with the exception of Ambrose Park, are located north of SR 4 (Ambrose Park is located just south of SR 4). In the longer term, the existing ARPD boundary area may be better served by the City of Pittsburg. The entire ARPD boundary is within the City of Pittsburg's planning area and SOI, and the City previously indicated a desire to eventually annex the community of Bay Point.[75] Upon annexation of the community of Bay Point, LAFCO may wish to establish ARPD as a subsidiary district of the City of Pittsburg, as nearly all District area would be within the Pittsburg city limits at that point.

AGENCY MSR DETERMINATIONS

GROWTH AND POPULATION PROJECTIONS

1) The estimated residential population within the district is approximately 23,000. Population is expected to increase at a rate similar to the City of Pittsburg, or in other words, at an annual rate of approximately 1.6 percent. The estimated population of the District by 2025 is 29,611.

2) Various planned and proposed developments have been approved in the vicinity of ARPD, within the City of Pittsburg, and additional growth is anticipated within the City in the future. Planned and proposed subdivisions within the western portion of the City of Pittsburg include Alves Ranch (530 total units), Bailey Estates (249 units), Lawlor Estates (50 units), Vista del Mar (540 units), and the San Marco development (2,938 units). Bailey Estates and Lawlor Estates are located within ARPD, and build-out of these subdivisions is anticipated to add approximately 936 residents to the District. ARPD did not identify any

[75] Contra Costa LAFCO: East County Sub-Regional MSR, Adopted December 10, 2008, Page VI-15.

growth concerns, and reported that growth within the City of Pittsburg thus far has not had a noticeable effect on service demand within ARPD.

PRESENT AND PLANNED CAPACITY OF PUBLIC FACILITIES AND ADEQUACY OF PUBLIC SERVICES, INCLUDING INFRASTRUCTURE NEEDS AND DEFICIENCIES

3) There are nearly 25 acres of neighborhood parkland owned and maintained by ARPD. This translates into 1.1 acres of neighborhood parkland per 1,000 district residents. Counting neighborhood parkland owned and maintained by the County within ARPD, and parkland adjacent to ARPD owned and maintained by the City of Pittsburg, there is approximately 48 acres of neighborhood parkland, amounting to 2.1 acres per 1,000 residents.

4) An additional 10 acres of neighborhood parkland is needed to achieve the County General Plan standard of 2.5 acres of neighborhood parkland per 1,000 residents.

5) Recreational programming provided by ARPD is inadequate. The District does not currently offer direct recreation programming; however, some recreation classes are offered by independent contractors at district facilities.

6) The District generally provides adequate park maintenance services, with the exception of Ambrose Park, which is planned to be improved significantly.

7) Major infrastructure needs and deficiencies exist at Ambrose Park, and a short-term goal of the District is to significantly improve the facility. Currently, the pool and related facilities, tennis courts, bocce ball court and basketball court are all closed and in a state of disrepair. The District has identified $10-12 million in needed renovations for the park, with the first phase of improvements ($1.7 million) set to begin in FY 09-10.

8) Service challenges faced by the District in recent years pertained to deteriorating infrastructure and a lack of financing for needed improvements.

9) The District has conducted capital improvement planning for Ambrose Park in conjunction with the City of Pittsburg, through the 2009 Ambrose Park Master Plan. The District has not prepared a written capital improvement plan for other park facilities.

FINANCIAL ABILITY OF AGENCIES TO PROVIDE SERVICES

10) The District reported that the current level of financing is sufficient for minimally adequate service provision. Funds are not sufficient for the agency to directly provide recreation programming, and significant capital needs were not addressed in recent years because the financing level was not adequate to provide services.

11) The District indicated that it plans to participate in the Proposition 1A Securitization Program to mitigate the impact of the loss of property tax revenues borrowed by the State.

12) The District may require increased revenues to finance additional services. The District identified the formation of an assessment district to fund new staff and recreation programs as a possible alternative.

STATUS OF, AND OPPORTUNITIES FOR, SHARED FACILITIES

13) Current facility sharing practices include the use of school facilities for after school programs. The County shares facilities with ARPD by renting office space in the Ambrose Community Center. ARPD had previously maintained County-owned park facilities by joint agency agreement; however, this agreement was terminated by the County last year.

14) ARPD and the City of Pittsburg have formed a partnership to plan and fund improvements at Ambrose Park.

15) The District is exploring the possibility of shared facilities with community resources, including the school district, for indoor offsite locations for recreation programs and activities. A lack of sufficient indoor facilities to create and run programs has been a limiting factor in recreation offerings for the District.

ACCOUNTABILITY FOR COMMUNITY SERVICE NEEDS, INCLUDING GOVERNMENTAL STRUCTURE AND OPERATIONAL EFFICIENCIES

16) The District demonstrated accountability and transparency by disclosing financial and service related information in response to LAFCO requests.

17) The District's constituent outreach activities include advertising meetings and special events on its website, in the local newspaper, through postings at district facilities, in Bay Point Municipal Advisory Council newsletters, and in mailings with utility bills.

SOI RECOMMENDATIONS AND DETERMINATIONS

LAFCO has not yet adopted an SOI for ARPD. The District was interviewed by LAFCO as part of the 2003-04 MSR cycle; however, LAFCO minutes from June 9, 2004 indicate that the MSR for the District was deferred and an SOI update was never initiated.

AGENCY PROPOSAL

The agency reported a desire for a coterminous SOI in order to continue planning for its boundary area.

SOI OPTIONS

Given the considerations addressed in the Municipal Service Review, four options are identified for the ARPD SOI:

<u>SOI Option #1 – Zero SOI</u>

Adopting a zero SOI would signify that LAFCO anticipates that the district will eventually become a subsidiary district of the City of Pittsburg, or be dissolved entirely and its functions provided by the City of Pittsburg. Such an SOI option would be logical if the City of Pittsburg intends to annex the community of Bay Point in the near future.

SOI Option #2 – SOI reduction to match existing and future service area

ARPD currently provides service to three park facilities located north of SR 4 (Ambrose Community Center and park, Alves Park and Anuta Park), and the Ambrose Park located south of SR 4. Because new parks south of SR 4 are being constructed in conjunction with the City of Pittsburg (and therefore turned over to the City for maintenance), the future service area of ARPD primarily consists of areas north of SR 4 (with the exception of Ambrose Park which will continue to be maintained by ARPD). A logical SOI update for ARPD would be a SOI reduction which removes all territory south of SR 4 and west of Bailey Road, as these areas would be annexed to the City of Pittsburg or the City of Concord if they are ever developed. Territory south of SR 4 east of Bailey Road should remain with ARPD, as these areas are either 1) within the City of Pittsburg but served by Ambrose Park, or 2) outside of the countywide urban limit line and not subject to residential development in the future (however, could support future parkland). Such an SOI would signify that LAFCO anticipates that the long-term service area of the district will be focused on the community of Bay Point north of SR 4, and the existing ARPD areas south of SR 4 (west of Bailey Road) will primarily be served by the City of Pittsburg. This option would also exclude the 12-acre Willow Cove Elementary School site within the City of Pittsburg.

SOI Option #3 – SOI reduction in City of Pittsburg overlapping areas

This SOI option would remove from the ARPD SOI all areas that overlap the City of Pittsburg, with the exception of Ambrose Park facility, which will remain within both jurisdictions. This option would create two non-contiguous SOI areas for ARPD, one north of the City of Pittsburg (and including Ambrose Park), and one south of the City of Pittsburg. Such an SOI option may not be desirable because it would exclude residential areas within the City of Pittsburg that are likely being served by ARPD. A slight variation on this option would be to leave in the residential areas within the City of Pittsburg served by Ambrose Park, primarily located between Bailey Road and Los Palos Drive.

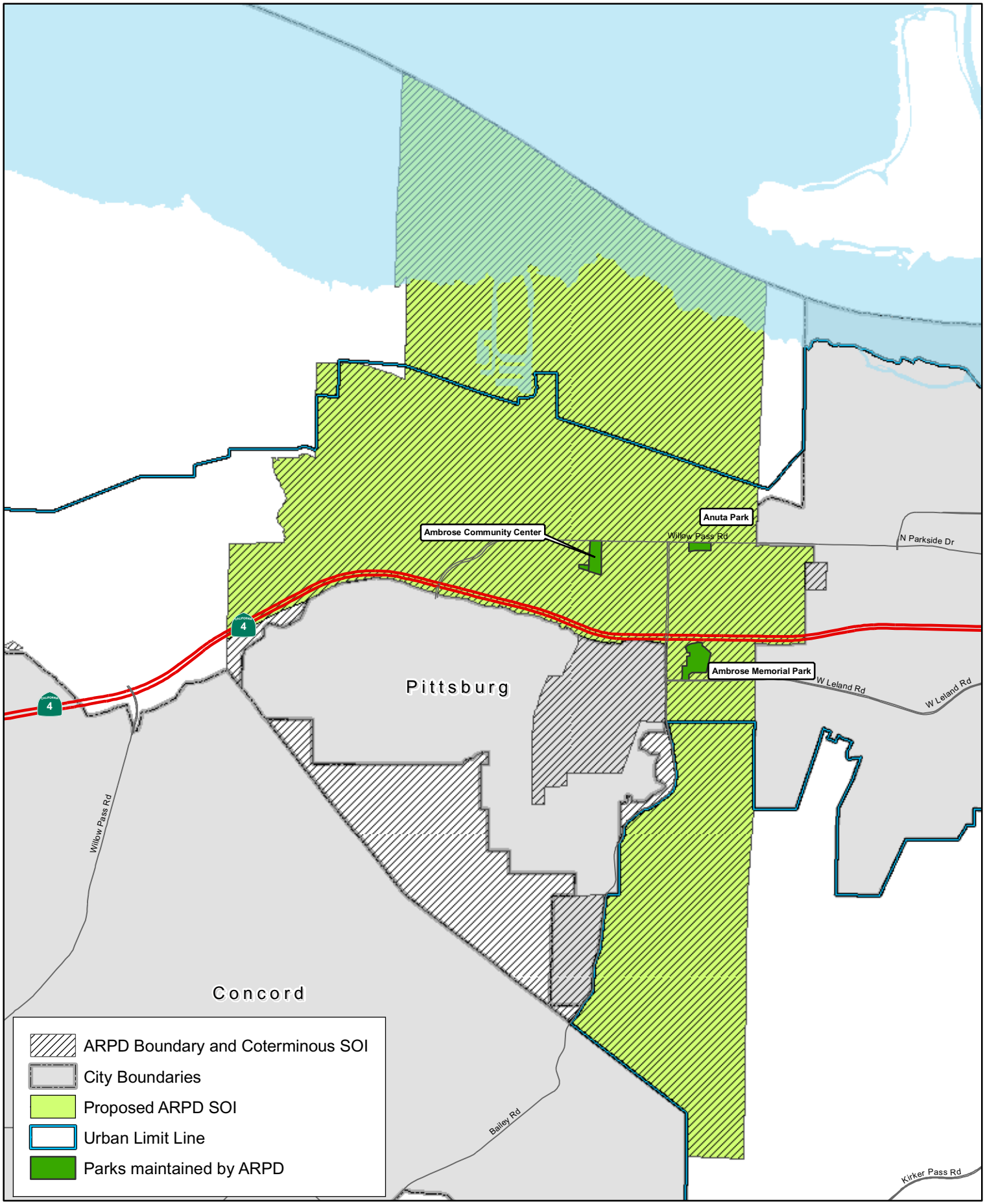
SOI Option #4 – Coterminous SOI

If LAFCO determines that the existing government structure is appropriate, then a coterminous SOI should be adopted for ARPD. This option would enable the district to continue to include the areas within its boundary in its long-term planning, which include overlapping portions with the City of Pittsburg.

RECOMMENDATION

It is recommended that LAFCO adopt an SOI for ARPD that includes the existing and future ARPD service area. Such an SOI would include the community of Bay Point, Ambrose Park and areas south of SR 4 and east of Bailey Road, but exclude the nearly 12-acre Willow Cove Elementary School site within the City of Pittsburg. This is the most logical service configuration because 1) ARPD does not provide maintenance to park facilities located south of SR 4, with the exception of Ambrose Park, 2) territory south of SR 4 and west of Bailey Road will most likely be annexed to the City of Pittsburg or the City of Concord if they are ever developed, and 3) territory south of SR 4 and east of Bailey road is located outside of the countywide urban limit line and will not be subject to residential development in the future, but could support future parkland.

Map 5-2 Ambrose Rec and Park District SOI Reduction: Option Two



Map created 3/1/62010
by Contra Costa County Conservation and Development Department,
Community Development Division–GIS Group
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Map 5-3 Ambrose Rec and Park District SOI Reduction: Option Three

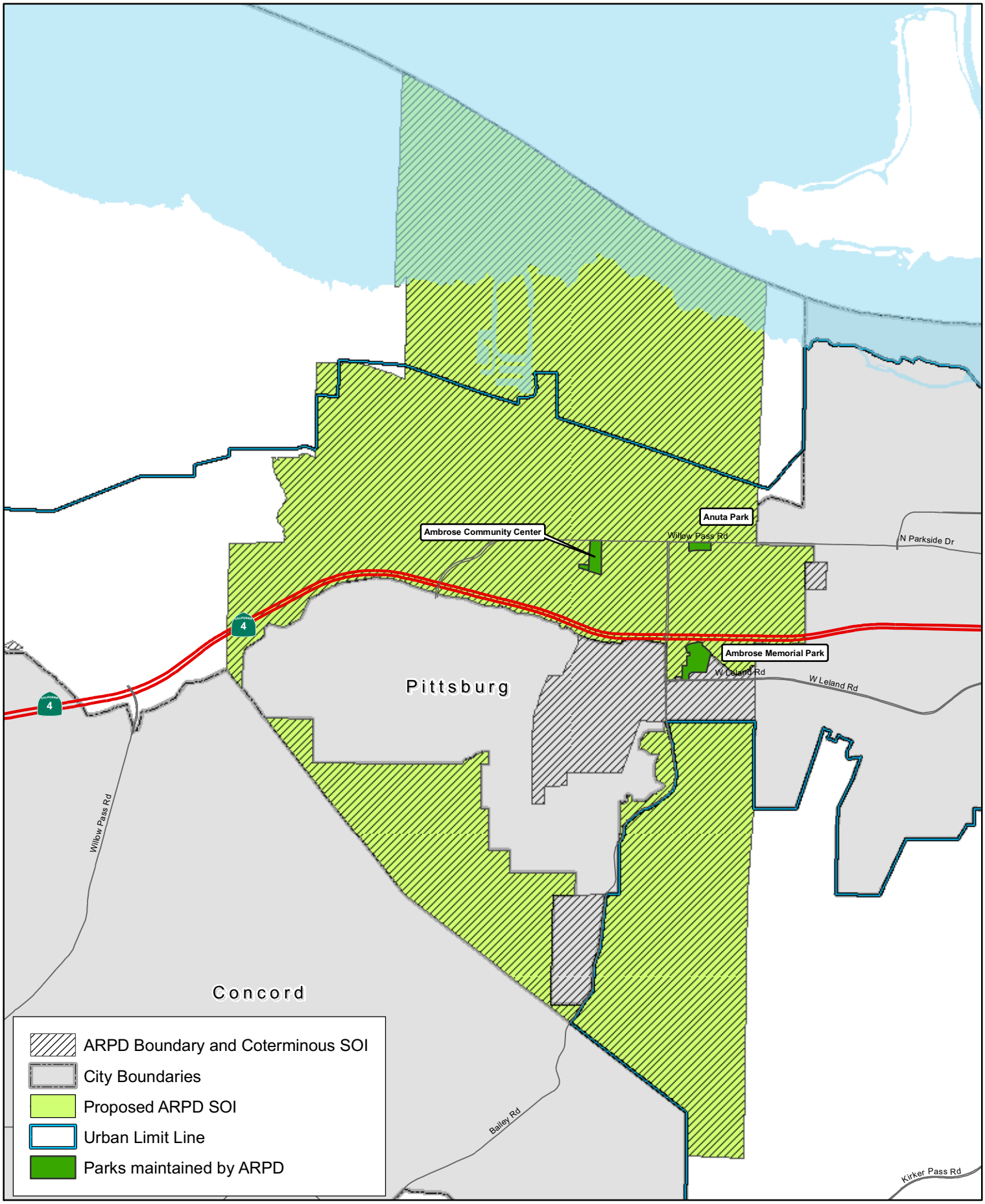

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Table 5-4: ARPD SOI Analysis

Issue	Comments
SOI update recommendation	Reduce SOI to match the existing and future ARPD parks and recreation service area (the community of Bay Point north of SR, Ambrose Park and areas outside of the countywide urban limit line).
Services provided	Park maintenance (directly) and recreation programming (by contract).
Present and planned land uses in the area	The District bounds encompass single family and multiple family housing, limited commercial and industrial areas, park and open space areas, and the Pittsburg/Bay Point BART Station.
Projected growth in the District/Recommended SOI	Population within ARPD is expected to increase at a rate similar to the City of Pittsburg, or in other words, at an annual rate of approximately 1.6 percent. The estimated population of the District by 2025 is 29,611.
Present and probable need for public facilities and services in the area	There is a present and probable future need for park and recreation services in the community of Bay Point and surrounding areas.
Opportunity for infill development rather than SOI expansion	The recommended SOI update would not expand the SOI beyond existing district boundaries.
Service capacity and adequacy	There are nearly 25 acres of neighborhood parkland owned and maintained by ARPD. This translates into 1.1 acres of neighborhood parkland per 1,000 district residents, short of the County's General Plan standard of 2.5 acres of neighborhood parkland per 1,000 residents. Including all neighborhood parkland in the vicinity of ARPD, an additional 10 acres of neighborhood parkland are needed to meet the County General Plan standard. The District generally provides adequate park maintenance services; however, the district does not currently directly offer recreation programming.
Social or economic communities of interest	The communities of interest are the unincorporated community of Bay Point and the incorporated City of Pittsburg.
Effects on other agencies	There are presently no effects on other agencies; however, the City of Pittsburg has in the past discussed annexation of the community of Bay Point.
Potential for consolidations or other reorganizations when boundaries divide communities	There is a potential for ARPD to become a subsidiary district of the City of Pittsburg, if the City annexes the community of Bay Point.
Location of facilities, infrastructure and natural features	Park and recreation facilities maintained by ARPD are located in the unincorporated community of Bay Point. The District is bounded by the City of Concord to the south and west, the City of Pittsburg to the east, and the Contra Costa-Solano county line to the north.
Willingness to serve	ARPD indicated a willingness to continue to serve district-owned park and recreation facilities for the foreseeable future.

Potential effects on agricultural and open space lands	No potential effects on agriculture or open space lands were identified.
Potential environmental impacts	Although no potential environmental impacts were identified in the MSR, the LAFCO counsel and planner should make CEQA determinations.

6. EAST BAY REGIONAL PARK DISTRICT

The East Bay Regional Park District (EBRPD) provides regional park and recreation services, and operates golf courses. Facilities and properties are located throughout Alameda and Contra Costa counties. Alameda is the principal LAFCO and has jurisdiction over the District.[76] Alameda LAFCO adopted park and recreation MSR determinations covering EBRPD in 2006. EBRPD is also included in this MSR for comprehensive park and recreation coverage in Contra Costa County.

AGENCY OVERVIEW

FORMATION AND BOUNDARY

EBRPD was formed on August 7, 1933 as an independent special district. The principal act under which the agency was formed is California Public Resources Code §5500 et. seq. The District was formed to acquire and maintain regional parkland in Contra Costa and Alameda counties.

The boundary of the District is coterminous with both Contra Costa and Alameda counties, as shown in Map 6-1.[77] The District's SOI is coterminous with its boundary. The service area for EBRPD includes District regional parklands, East Bay Municipal Utility District (EBMUD) owned lands, the San Francisco Water Department Watershed, the East Shore State Park (owned by the State of California, but operated by EBRPD), and the Middle Harbor and Port View Parks operated by the Port of Oakland.

The EBRPD boundary encompasses a total of 1,745 square miles in both Contra Costa and Alameda counties, according to County Assessor data on acreage of parcels. In Contra Costa County, the boundary land area of the EBRPD is 720 square miles. The District owns or operates 65 regional parks, recreation areas, wilderness, shorelines, preserves and land banks spanning 98,369 acres, as of November 2008.[78]

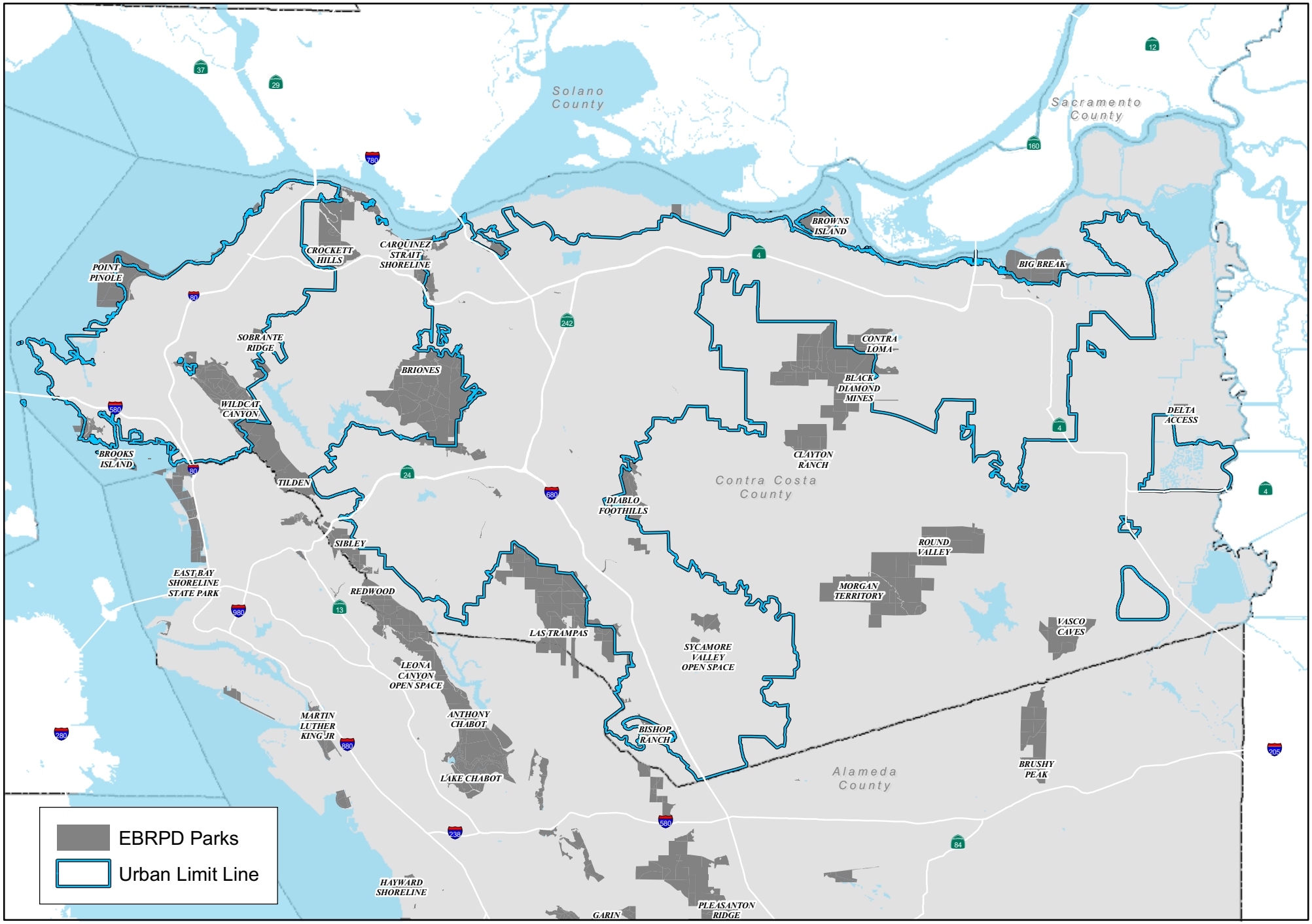
[76] For a multi-county district, the LAFCO in the "principal county" has exclusive jurisdiction (Government Code §56387) unless it cedes its jurisdiction on a particular proposal to a LAFCO in another county and that LAFCO accepts (Government Code §56388). Principal county is defined as the county with the greatest portion of the entire assessed value in the district (Government Code §56066).

[77] Since the City of Livermore annexed to the District in 1992, the District's territory has encompassed all of Alameda and Contra Costa counties.

[78] EBRPD, *2009 Proposed Budget*, p. 8.

Map 6-1

East Bay Regional Park District and Coterminous SOI



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LOCAL ACCOUNTABILITY AND GOVERNANCE

The District has a seven-member governing body. Board members are elected by geographic district to four-year terms. The last contested election for a board seat occurred in 2008 in Contra Costa County. EBRPD also has a Park Advisory Committee made up of 21 citizen-members, appointed by the EBRPD Board of Directors. Advisory Committee members are appointed for two-year terms and may serve a total of four consecutive terms, or eight years.

EBRPD updates constituents through its website, a bimonthly activities newsletter, community outreach programs, and through the Park Advisory Committee. Board meeting agendas and minutes are posted in multiple locations, and on the District's website. The District also posts other public documents and notifications on its website.

With regard to customer service, complaints may be through phone calls, email, letters and in-person. Complaints most often related to off-leash dogs, speeding mountain bicyclists, trail damage from cattle grazing and potholes in regional trails. The District handles in-person and phone complaints directly when possible. Written complaints and the District's responses are reviewed by the Board.

The District's community service activities include efforts to encourage recycling, waste reduction, green construction and environmentally oriented practices. The District recycles waste at the parks, purchases recycled products and uses alternative building materials.

The District demonstrated accountability in its disclosure of information and cooperation with Alameda LAFCO during the 2006 countywide MSR and Contra Costa LAFCO during the 2009 Fire and Emergency Medical Services MSR.

SERVICE DEMAND AND GROWTH

The District bounds encompass a wide variety of land uses (all land uses within Alameda and Contra Costa counties); however, in the District's 65 regional parks the primary land use is open space, recreation and natural resource management.

The District considers its customer base to be park visitors and residents of Alameda and Contra Costa counties. Service demand is highest during warm weather months, typically from June through mid-November. The District estimates that there are roughly 14 million park visitors per year, or nearly 38,330 per day. Approximately 24 percent of service recipients (i.e., park visitors) are not constituents.[79]

The 2006 Alameda LAFCO MSR estimated that the number of jobs in District was 1.1 million, based on analysis of GIS, Census and 2007 Association of Bay Area Governments (ABAG) projections data.[80] The projected job growth rate from 2005 to 2030 was 46 percent in Contra Costa County and 81 percent in Alameda County.

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[79] Alameda LAFCO, *Community Services MSR Agency Appendix,* May 2006, p. A-42.

[80] This includes 379,030 jobs in Contra Costa County and 730,270 jobs in Alameda County.

The estimated residential population in the District bounds was 2.4 million at the time of the 2000 Census.[81] The District's population density was approximately 1,642 per square mile in 2000. The estimated number of residents in District bounds in 2008 was 2.6 million, based on analysis of GIS, Census and 2007 ABAG projections data. The projected population growth rate from 2008 to 2030 was 20 percent in both Contra Costa and Alameda counties. In Contra Costa, significant residential growth is anticipated in the cities of Brentwood and Oakley in east county, Richmond in west county, and San Ramon in the southern portion of the county.

The District is not a land use authority, and does not hold primary responsibility for implementing growth strategies. In 2004, the citizens of Alameda and Contra Costa counties passed Measure CC, a multi-year parcel tax measure, which funded wildfire hazard reduction efforts and other park improvement projects. Measure WW, approved in November 2008, will allow the District to continue acquiring more parkland, for the purpose of preserving important habitat, wildlife, trail corridors, outdoor recreation areas, and improve San Francisco Bay shoreline access.[82] Seventy-five percent of the $500 million bond extension will fund regional park acquisition and capital projects. Of the 67 capital projects identified for Measure WW funding, 36 are located in Contra Costa County, with 13 of these projects involving the acquisition of new parkland.[83]

MANAGEMENT

The District employs 622 permanent full-time staff positions, in addition to 85 seasonal employees. Park operations and maintenance is conducted through the Operations Division of the district, which employs approximately 400 staff positions. The head of the Operations Division reports to the general manager, who reports to the Board of Directors.

All District employees are evaluated annually. New hires and personnel on one-year promotion probation are evaluated quarterly. EBRPD annually provides performance goals for each department. The management reviews performance evaluations and written objectives with each division.

To monitor workload, the District tracks park activities, such as recreation programs, and maintenance project hours. These indicators are used to re-focus program efforts to reach goals and to provide planning benchmarks for future activity. The assessment of overall workload is required to operate and manage current parks and trails, and is used to plan the financing and construction of new facilities.

The District reported that its financial planning efforts include annual budgets, annual financial audits, a capital improvement plan, and a capital plan for Measure WW funds. The District produces a five-year capital improvement plan (CIP) annually, with the most recent CIP completed in 2008. The most recent audited financial statement available on the District's website was for CY 2008. Planning documents include the 1997 Master Plan and a 2007 Master Plan Map. The District reported that it planned to begin updating the written policy portion of the Master Plan in 2009.

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[81] This includes 948,816 in Contra Costa County and 1,443,741 in Alameda County.

[82] EBRPD, *Adopted Budget 2008*, p. 281.

[83] EBRPD, Measure WW Regional Open Space, Wildlife, Shoreline and Parks Bond Extension Project List, 2008.

FINANCING

The District reported that the current financing level is generally adequate to deliver services; however, a significant challenge is accounting for anticipated reduction in revenue from decreased property taxes due to current and forecasted property assessments.

The District practices appropriate fund accounting as required.

The District's total revenues were $163 million in CY 08. The District's general fund is primarily funded by property taxes and service charges. Revenue sources include property taxes (82 percent), service charges (6 percent), grants and governmental aid (5 percent), interest (5 percent), rents and leases (1 percent), and miscellaneous sources (1 percent).

The District's expenditures were $156 million in CY 08. Of this amount, 54 percent was spent on compensation, 14 percent on services and supplies, 19 percent on debt service, and 14 percent on capital projects.

The District reported $137 million in long-term debt at the end of CY 08. The District offers health benefits to retirees; the associated OPEB liability was $39 million, of which $7.9 million was funded at the end of 2008. The District offers pension benefits to employees through the California Public Employees Retirement System; employee pension funds were fully funded at the end of 2008. The District had $115 million in unrestricted net assets at the close of CY 08.

PARKS AND RECREATION SERVICE

NATURE AND EXTENT

The District maintains and operates regional parks, shorelines, trails, recreational areas, rental facilities, and golf courses. The District provides recreational programs at its facilities including fishing, boating, swimming, camping, golf, hiking, arts and craft activities, and environmental education activities. The District provides maintenance of its natural open space areas, park areas, trees, landscaping, buildings, and other structures at the District's park sites and facilities.

LOCATION

Park and recreation services are provided throughout Alameda and Contra Costa counties. The Districts does not directly provide park and recreation service outside its bounds, although anyone is allowed to use District facilities. Fees for non-resident use of facilities and recreational programs are higher than resident fees.

INFRASTRUCTURE

The District's key infrastructure includes 65 regional parks, recreation areas, wilderness, shorelines, preserves and land bank areas; 29 regional inter-park trails; 1,150 miles of trails within parklands; 11 freshwater swimming and/or fishing areas, 40 fishing docks and three bay fishing piers; 235 family campsites and 42 youth camping areas; two golf courses; nine interpretive and education centers; and 18 child play areas.

In terms of infrastructure needs and deficiencies, the District has budgeted $41.3 million for capital improvements in 2010. Capital projects costs include land acquisition, park development and parkland rehabilitation. Capital projects are largely funded by various grants and voter-approved bond measures (Measure AA authorized in 1988 and extended in 2008 as Measure WW). Additionally, in 2004 voters approved measure CC, which provides approximately $3 million of new operating revenue to augment funding for park facilities and projects a at locations from Richmond to Oakland.[84]

Table 6-1: EBRPD Facilities in Contra Costa County

Regional Park/Facility Name	
Antioch/Oakley Shoreline	Kennedy Grove
Bay Point	Las Trampas
Big Break Shoreline	Little Hills
Bishop Ranch	Marsh Creek Trail
Black Diamond Mines	Martinez Shoreline
Briones	Miller/Knox
Brooks Island	Morgan Territory
Browns Island	North Richmond Wetlands
Carquinez Straight	Point Isabel
Clayton Ranch	Point Pinole
Contra Loma	Rancho Pinole
Crockett Hills	Redwood
Deer Valley	Round Valley
Deer Valley	San Pablo Bay Shoreline
Delta Access	Sobrante Ridge
Delta Recreation	Sycamore Valley Open Space
Delta Trail	Tilden Park
Diablo Foothills	Vasco Caves
Diablo Foothills/Castle Rock	Waterbird
Iron Horse to Mount Diablo Trail	Wildcat Canyon
Iron Horse Trail	Wildcat Creek Trail

[84] East Bay Regional Parks District. *Budget and Finances*. URL accessed on 1/27/10, http://www.ebparks.org/about/budget

GOVERNANCE ALTERNATIVES

The boundary of EBRPD includes the entirety of both Alameda and Contra Costa counties. No new governance alternatives were identified for the District.

AGENCY MSR DETERMINATIONS

GROWTH AND POPULATION PROJECTIONS

1) Residential population growth in the EBRPD boundary is projected to be about 20 percent from 2008 to 2030, from 2.6 million to 3.1 million.
2) Jobs are projected to grow by 46 percent in Contra Costa County and 81 percent in Alameda County, from 2008 to 2030.
3) Service demand is anticipated to increase in the future, as both the number of visitors to regional parklands increases, and the amount of parkland served by the District increases.

PRESENT AND PLANNED CAPACITY OF PUBLIC FACILITIES AND ADEQUACY OF PUBLIC SERVICES, INCLUDING INFRASTRUCTURE NEEDS AND DEFICIENCIES

4) Facilities within the District include 65 regional parks, recreation areas, wilderness, shorelines, preserves and land bank areas. A total of 42 of these facilities are located, or partially located, in Contra Costa County.
5) EBRPD plans for capital needs through a five-year CIP, which is prepared annually along with the budget. EBRPD continually plans for new parkland acquisitions and parkland development.
6) The District has budgeted $41.3 million for capital improvements in 2010.

FINANCIAL ABILITY OF AGENCIES TO PROVIDE SERVICES

7) The current financing level is generally adequate to deliver services; however, a significant challenge is accounting for anticipated reduction in revenue from decreased property taxes due to current and forecasted property assessments. The District's general fund is primarily funded by property taxes.
8) EBRPD project funding will rely heavily on Measure WW funds, approved by voters in November 2008. Seventy-five percent of the $500 million bond extension ($375 million) will fund regional park acquisition and capital projects, including 36 projects in Contra Costa County.

STATUS OF, AND OPPORTUNITIES FOR, SHARED FACILITIES

9) The District identified working with the City of Concord and the National Park Service to acquire, restore and develop parkland at the former Concord Naval Weapons Station as an opportunity for collaboration.

10) The District jointly operates and manages regional trails and trails extending outside of its jurisdiction. EBRPD also manages several properties for the State of California, and shares management of some watershed/parkland with local water agencies.

ACCOUNTABILITY FOR COMMUNITY SERVICE NEEDS, INCLUDING GOVERNMENTAL STRUCTURE AND OPERATIONAL EFFICIENCIES

11) EBRPD demonstrated accountability based on the measures of constituent outreach efforts, transparency, and disclosure practices.

12) The District demonstrated accountability and transparency by disclosing financial and service related information in response to LAFCO requests.

7. GREEN VALLEY RECREATION AND PARK DISTRICT

Green Valley Recreation and Park District (GVRPD) owns and operates a swimming pool for the Cameo Acres and serves the surrounding areas of Danville and Alamo. GVRPD also offers activities commonly provided at community pools, including swim lessons, a non-competitive swim team, lifeguard training, community and social events.

AGENCY OVERVIEW

FORMATION AND BOUNDARY

GVRPD was formed in 1949 as an independent special district.[85] The District was formed to provide maintenance and recreation services to a swimming pool in the Town of Danville.

The principal act that governs the District is the Recreation and Park District Law.[86] The principal act empowers Recreation and Park Districts to 1) organize, promote, conduct, and advertise programs of community recreation, including, but not limited to, parks and open space, parking, transportation, and other related services that improve the community's quality of life, 2) establish systems of recreation and recreation facilities, including, but not limited to, parks and open space, and 3) acquire, construct, improve, maintain, and operate recreation facilities, including, but not limited to, parks and open space, both inside and beyond the district's boundaries.[87] Districts must apply and obtain LAFCO approval to exercise latent powers, that is, those services authorized by the principal act but not provided by the district by the end of 2000.[88]

The District's boundary is located entirely within Contra Costa County, located in the northeastern portion of the Town of Danville east of Green Valley Road, as shown in Map 7-1. The boundaries encompass approximately 162 acres, or approximately 0.25 square miles. Contra Costa is the principal county and Contra Costa LAFCO has jurisdiction.

[85] Board of Equalization official date.

[86] California Public Resources Code §5780-5791

[87] California Public Resources Code §5786.

[88] Government Code §56824.10.

Map 7-1 Green Valley Recreation & Park District and Coterminous SOI

Map created 8/28/2006
by Contra Costa County Community Development, GIS Group
651 Pine Street, 4th Floor North Wing, Martinez, CA 94553-0095
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Miles
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LAFCO approved an MSR for GVRPD in 2008.[89] In addition, in 2008, LAFCO expanded the District's SOI in anticipation of a future annexation. However, the District has since determined that the annexation is not feasible. Consequently, in 2009, LAFCO reduced the SOI to coincide with the existing service boundary of the District.[90]

LOCAL ACCOUNTABILITY AND GOVERNANCE

The District is governed by a five-member board. For contested elections, board members are elected at large by voters within the District to staggered four-year terms. Recent board elections have been uncontested. Uncontested vacancies on the governing body are filled by appointment. GVRPD board members serve on a volunteer basis and do not receive compensation.

Table 7-1: GVRPD Governing Body

Green Valley Recreation and Park District				
Governing Body				
Members	**Name**	**Position**	**Began Serving**	**Term Expires**
	Cynthia Larson	Director	2010	2010
	Bill Montana	Director	2007	2010
	Cadi Stephenson	Director	2008	2010
	Blythe Soria	Director	2007	2012
	Scott Horton	Director	2008	2012
Manner of Selection	Elections at large or by appointment when uncontested			
Length of Term	Four years			
Meetings	Date: Third Tuesday of the month at 7:00 p.m.		Location: 116 Vista del Diablo, Danville, CA 94526	
Agenda Distribution	NP			
Minutes Distribution	Posted to District website			
Contact				
Email/Website	greenvalleypool@hotmail.com, http://www.thegreenvalleypool.com			

The District maintains a website which contains information regarding pool hours, activities, programs, and events. The website has information regarding the time and location of Board meetings, and has links to meeting minutes; however, meeting agendas are not posted to the website. With regard to customer service, complaints may be filed by mail, telephone or email. All contact information is listed on the District's website.

The District has demonstrated accountability to LAFCO in recent years by participating in the MSR process and making presentations to LAFCO regarding the operations of the District. In addition, the District has made some efforts to address some of the challenges identified in the 2008 MSR (e.g., preparation of an annual budget, conduct periodic financial audits, update website, etc.)

[89] The MSR was approved by LAFCO on August 13, 2008, and the SOI expansion was approved on July 9, 2008.

[90] The SOI reduction was approved by LAFCO on October 14, 2009.

SERVICE DEMAND AND GROWTH

The District bounds encompass a built-out residential area in the northeastern portion of the Town of Danville.

The District considers its customer base to be members and guests, and to residents and non-residents of the District. The District has approximately 120 member families. There were 1,126 residents in the District, according to the 2008 MSR. The District's population density was 4,448 per square mile, compared with the 2009 countywide density of 1,473. The area has not experienced significant recent growth since it is a built-out residential area, and projected growth is less than one percent annually.

The District is not a land use authority, and does not hold primary responsibility for implementing growth strategies.

MANAGEMENT

The District does not employ any full-time administrative staff. The District relies on volunteers and part-time seasonal staff, and usually maintains a part-time staff of 12.[91] The pool and grounds are maintained under contract by local pool service and gardening companies.

The District utilizes the County Treasurer to manage its finances, and relies on the County to collect District membership dues and handle invoices for payments and other financial transactions. A recommendation of the 2008 MSR was for the District to have independent financial audits performed on a regular basis.

The District has not undertaken significant planning efforts in recent years. A recommendation of the 2008 MSR was for the District to adopt an annual budget of estimated revenues and expenditures.[92] The District has not prepared a capital improvement plan for significant facility improvements; however, the 2008 MSR reported that the GVRPD pool is over 50 years old and in need of replacement. GVRPD should include capital improvement planning for replacement of the pool and related facilities in its annual budgeting process. Preliminary designs would nearly triple the size of the current pool (from 1,100 square feet to 3,150 square feet), and would cost approximately $450,000.[93]

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[91] A special district of limited powers has only those powers given to it by its enabling statutes or other legislation applicable to that district and cannot exceed those powers. Some enabling statutes specifically address whether members of the governing board can serve as staff, others are silent on this issue. If a district's enabling statutes specifically allow a board member to serve as staff, this practice may be permissible. However, in the absence of specific statutory authorization, this practice may result in a prohibited legal conflict of interest or incompatible activity. A conflict of interest can have serious legal consequences for the board member involved. It is recommended that all districts whose board members serve as staff, consult with their legal counsel regarding the statutory authority for such dual service, and ask legal counsel to evaluate whether any prohibited conflicts of interest, incompatible activities or other legal problems might arise from this arrangement.

[92] The MSR did not specify whether the District had adopted annual budgets in the past.

[93] Contra Costa LAFCO: Green Valley Recreation and Park District MSR, Adopted August 13, 2008, p. 4.

FINANCING

The District reported that its financial ability to provide services is limited, as the District is constrained by available revenues and legal constraints on revenues. The District has considered increasing membership dues to raise revenues, in addition to expanding its revenue base through a boundary expansion. A recommendation of the 2008 MSR was for the District to look at levying an assessment to help fund replacement of the pool.

The District received $102,430 in revenues in FY 06-07. GVRPD relies primarily on user fees to fund services. User fees generated 61 percent of operating revenues in FY 06-07 and property taxes generated approximately 39 percent.

Total expenditures for FY 06-07 were $81,250, 34 percent of which was for personnel costs (payroll), and 66 percent for contract services (gardening and pool maintenance) and insurance.

The District had no long-term debt at the end of FY 06-07; however, the District has proposed financing pool expansion with a loan.

GVRPD charges seasonal membership dues, with the season running from mid-June to late August. The District offers varying membership rates for resident, non-resident and senior citizens. In addition, GVRPD charges fees for various programs, including swim lessons, swim team, private lessons and guest fees per its fee schedule.

As of the 2008 MSR, household membership fees were $350 per season for residents, $395 per season for non-residents and $125 per season for seniors. The District reported that membership decreased by 15 percent in 2009. The District also charges fees for activities and facility rentals, group and private swim lessons, and guest fees. Activity and facility rental fees are adjusted annually; however, membership fees have remained unchanged for approximately 10 years. The 2008 MSR recommended regular review/updating of its membership fees. In addition, the 2008 MSR recommended that the District look for alternative sources of funding, including levying an assessment, sharing of resources and grant opportunities (e.g., Measure WW).[94]

PARKS AND RECREATION

NATURE AND EXTENT

GVRPD provides maintenance and recreation services to the Green Valley swimming pool. The District conducts pool maintenance and grounds maintenance by contract.

LOCATION

GVRPD provides services to district residents and non-residents in the Alamo and Danville area.

[94] Based on the 2008 population, GVRPD would have a Measure WW allocation of $50,870.

INFRASTRUCTURE

Key infrastructure in the District is the Green Valley swimming pool, located at 1515 Green Valley Road in the Town of Danville.

Infrastructure needs identified for the District include replacement of the pool, which is over 50 years old.

The District does not currently share facilities, and the 2008 MSR recommended that the District should look for ways to share resources and/or facilities with other agencies (i.e., Town of Danville, school district, etc.).

GOVERNANCE ALTERNATIVES

Three governance alternatives were identified in the 2008 MSR: maintain the status quo with annual reports back to LAFCO, consolidate with the Town of Danville, or revert to a homeowners association.

In October 2009, LAFCO revisited the governance options for the GVRPD. Several other public and private options were identified. Additional public options included consolidating with EBRPD, with the San Ramon Valley School District, or with CSA R-7. Private options included forming a non-profit entity, forming a homeowners association, or joining with another private pool association (e.g., Del Amigo Pool Association). A two-year deadline was set for GVRPD to return to LAFCO with a status report and options. LAFCO stressed that an independent special district is not an appropriate governance option and would never be formed today. LAFCO encourage the District to explore other operational and governance options.

AGENCY MSR DETERMINATIONS

GROWTH AND POPULATION PROJECTIONS

1) The GVRPD serves households primarily from the Danville and Alamo areas. The population within the District boundaries is approximately 1,126. The territory within the District boundaries is built-out, and growth within the existing boundaries is projected at less than 1 percent annually.

PRESENT AND PLANNED CAPACITY OF PUBLIC FACILITIES AND ADEQUACY OF PUBLIC SERVICES, INCLUDING INFRASTRUCTURE NEEDS AND DEFICIENCIES

2) The District's primary facility is the Green Valley swimming pool, which is over 50 years old and in need of replacement.

3) The District hopes to replace the Green Valley pool with a new pool almost three times the size; however, the new pool is projected to cost approximately $450,000, and the District does not yet have the funding.

4) Service challenges are due to an aging pool facility and a lack of financing for needed improvements.

5) The District has not undertaken significant planning efforts in recent years, including conducting capital improvement planning for the new pool, and performing an independent financial audit.

FINANCIAL ABILITY OF AGENCIES TO PROVIDE SERVICES

6) The District reported that its financial ability to provide services is limited, as the District is constrained by available revenues and legal constraints on revenues. The District has considered increasing membership dues to raise revenues, in addition to expanding its revenue base through a boundary expansion. A recommendation of the 2008 MSR was for the District to look at levying an assessment to help fund replacement of the pool, in addition to sharing of resources and pursuing grant opportunities.

7) The primary sources of revenue for the GVRPD include property tax and user fees. Due to funding, the District is limited in the services it can provide. The District should consider periodic review and update of its membership fees, which it reported had not been updated in at least 10 years.

STATUS OF, AND OPPORTUNITIES FOR, SHARED FACILITIES

8) The District does not currently share facilities. The District should look for ways to share resources and/or facilities with other agencies (e.g., Town of Danville, school district).

ACCOUNTABILITY FOR COMMUNITY SERVICE NEEDS, INCLUDING GOVERNMENTAL STRUCTURE AND OPERATIONAL EFFICIENCIES

9) Accountability to local voters is constrained by a lack of contested elections. Improvements to accountability could be made by emphasizing public outreach activities through email lists and the District's website.

10) The District has demonstrated accountability to LAFCO in recent years by participating in the MSR process and making presentations to LAFCO regarding the operations of the District.

8. PLEASANT HILL RECREATION AND PARK DISTRICT

Pleasant Hill Recreation and Park District (PHRPD) provides recreation and park services to the City of Pleasant Hill, a portion of the City of Lafayette, and a small portion of the City of Walnut Creek and the unincorporated community of Walden/Contra Costa Centre.

AGENCY OVERVIEW

FORMATION AND BOUNDARY

PHRPD was formed on January 22, 1951 as an independent special district. The District was formed to provide recreation and park services to the unincorporated community of Pleasant Hill.[95]

The principal act that governs the District is the Recreation and Park District Law.[96] The principal act empowers Recreation and Park Districts to 1) organize, promote, conduct, and advertise programs of community recreation, including, but not limited to, parks and open space, parking, transportation, and other related services that improve the community's quality of life, 2) establish systems of recreation and recreation facilities, including, but not limited to, parks and open space, and 3) acquire, construct, improve, maintain, and operate recreation facilities, including, but not limited to, parks and open space, both inside and beyond the district's boundaries.[97] Districts must apply and obtain LAFCO approval to exercise latent powers, that is, those services authorized by the principal act but not provided by the district by the end of 2000.[98]

The District's boundary is located entirely within Contra Costa County, and includes the entirety of the City of Pleasant Hill, in addition to a portion of the City of Lafayette (in the southwest of the District), and a small portion of the City of Walnut Creek and the unincorporated community of Walden/Contra Costa Centre (in the southeast of the District), as shown in Map 8-1.[99] The boundaries encompass approximately 8.8 square miles, or 5,616 acres. Contra Costa is the principal county and Contra Costa LAFCO has jurisdiction.

[95] The City of Pleasant Hill incorporated in 1961.

[96] California Public Resources Code §5780-5791

[97] California Public Resources Code §5786.

[98] Government Code §56824.10.

[99] It is not clear from the LAFCO record how or why portions of the cities of Lafayette and Walnut Creek came to be included within PHRPD. It is likely that these areas were unincorporated at formation of PHRPD and were not detached from the district when they were annexed to the cities.

Map 8-1

Pleasant Hill Recreation and Park District and Coterminous Sphere of Influence

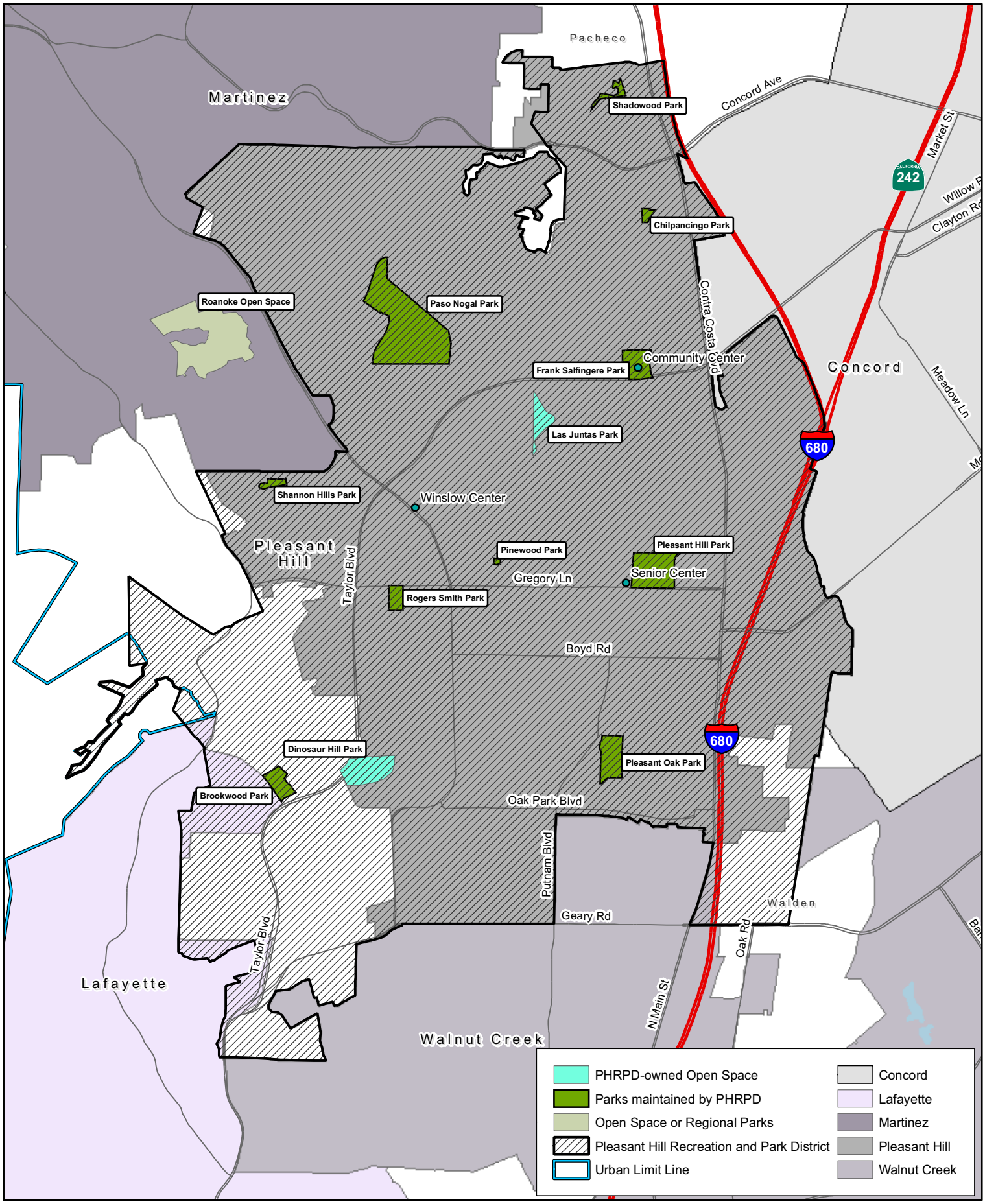

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Table 8-1: PHRPD Boundary History

Project Name	LAFCO Reso./Date	Change Type	Acres[1]	Recording Agency[2]
Formation	1/22/1951	Formation	NA	BOE
Pre-LAFCO Annexation	4/17/1952	Annex	NA	BOE
Pre-LAFCO Detachment	7/9/1953	Detach	NA	BOE
Larkey Detachment	9/19/1956	Detach	NA	BOE
Pre-LAFCO Annexation	7/8/1965	Annex	NA	BOE
Northern Terrace Annexation	9/20/1965	Annex	NA	BOE
Virginia Hills Detachment	7/8/1965	Detach	NA	BOE
El Dorado Tract Detachment	7/8/1965	Detach	NA	BOE
Colony Park Detachment	12/19/1966	Detach	NA	BOE
Palos Verdes and Woodside Acres Detachment	12/19/1966	Detach	NA	BOE
6 Parcel Annexation	7/24/1968	Annex	NA	BOE
5 Parcel Detachment	7/24/1968	Detach	NA	BOE
Shaw #3 Detachment	5/20/1970	Detach	NA	BOE
Alumbaugh Youth Homes Detachment	7/19/1971	Detach	NA	BOE
Shaw #1 Detachment	7/19/1971	Detach	NA	BOE
Trand Parcel Detachment	12/15/1971	Detach	NA	BOE
Cayucus Drive Extension Reorganization	12/1/1971	Detach	NA	Both
Pleasant Hill Recreation and Park District Reorganization	12/6/1978	Annex/ Detach	161.6 1,081.4	Both
Flaming Oak Reorganization	81-32	Annex	16.4	Both
Greenwood Reorganization	82-13	Annex	3.9	Both
Paso Nogal No. 55 Reorg.	84-45	Annex	14.2	Both
Ellinwood II Reorganization	85-34	Annex	8.0	Both
Oak Creek-Greenwood Reorg.	87-16	Annex	16.3	Both
Ironwood Court Reorg.	88-12	Annex	2.7	Both
Pleasant Hill Country Club Reorganization	89-14	Annex	50.7	Both
Contra Costa Country Club Reorganization	98-30	Annex	160.0	Both
Plambeck Reorganization	99-24	Annex	0.9	Both

Notes:
(1) NA indicates that acreage is not available in the LAFCO records.
(2) Recording agency indicates whether Contra Costa LAFCO or the Board of Equalitzation (BOE) maintains records of the particular boundary change.

LAFCO adopted an MSR for PHRPD in 2004, and discussed an SOI update to include the unincorporated community of Pacheco, but did not take action on the SOI at that time.[100] LAFCO staff assume that the existing SOI is coterminous with PHRPD bounds based on previous boundary changes, but no SOI adoption resolution is contained in the LAFCO records.

Boundary History

According to LAFCO and Board of Equalization (BOE) records, there have been 26 boundary change actions for PHRPD since formation in 1951. During the pre-LAFCO period, there were 15 boundary change actions, consisting of four annexations to the District, and 11 detachments from the District.[101] Contra Costa LAFCO has records from 11 boundary changes for PHRPD since 1971, including 10 annexations of territory to the District, and two detachments from the District.[102] The most significant action in the LAFCO record is the 1978 Pleasant Hill Recreation and Park District Reorganization, in which 1,081 acres were detached from the district and 162 acres were annexed to the district.

LOCAL ACCOUNTABILITY AND GOVERNANCE

The District is governed by a five-member board. For contested elections, board members are elected at large to staggered four-year terms. The last contested election for a board seat occurred in November 1996. Uncontested vacancies on the governing body are filled by appointment. PHRPD board members receive compensation of $100 per meeting (at a maximum of $200 per month).

Constituent outreach activities conducted by the District include an email newsletter and a catalog of district programs, activities and events sent out three times a year (*PHRPD Spare Time Spotlight*) to all District residents. Also, three times a year the District sends an email news bulletin with current information about the District. To encourage voter participation regarding the recent bond measure, the District conducted informational presentations, sent mailers to registered voters and posted information to its website. All District meetings are recorded and held for 30 days for public review. In addition, District agendas are emailed to a public interest list and mailed to the Contra Costa County Library to have on file for public review. The District also maintains a website that includes up-to-date listings of special events, activities and classes.

With regard to customer service, complaints may be filed with the program supervisor or general manager by phone call, email or letter, or in person at a board meeting. Within FY 08-09 there were various complaints regarding the need to upgrade restrooms at park facilities, in addition to two complaints regarding the cleanliness of Pleasant Hill Park, one complaint regarding smoking in Pleasant Hill Park and the misconduct of teenagers frequenting the park, and one complaint regarding the need to upgrade the off-leash dog park at Paso Nogal Park. All complaints were followed up by a letter of response and direct staff communication with the complaining party.

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[100] LAFCO minutes from June 9, 2004 indicate that the Commission adopted the Statement of Determinations for the PHRPD MSR, but do not indicate that any action was officially taken on the SOI.

[101] The first LAFCO resolution for PHRPD, the Cayucus Drive Extension Reorganization, is dated December 1, 1971.

[102] The Pleasant Hill Recreation and Park District Reorganization, dated December 6, 1978, both annexed and detached territory from the District.

Table 8-2: PHRPD Governing Body

Pleasant Hill Recreation and Park District				
Governing Body				
Members	**Name**	**Position**	**Began Serving**	**Term Expires**
	Dennis Donaghu	Director	2006	2012
	Joe Hurd	Director	2007	2010
	Sandra Bonato	Director	2009	2010
	Cecile Shepard	Director	1996	2010
	Sherry Sterrett	Director	1996	2012
Manner of Selection	Elections at large			
Length of Term	Four years			
Meetings	Date: Second and fourth Thursdays of the month at 7:00 p.m.		Location: 147 Gregory Ln., Pleasant Hill, CA 94523	
Agenda Distribution	Posted online and at district facilities			
Minutes Distribution	Posted online and by request from district office			
Contact				
Contact	General Manager			
Mailing Address	147 Gregory Ln., Pleasant Hill, CA 94523			
Email/Website	http://www.pleasanthillrec.com/			

The District demonstrated full accountability in its disclosure of information and cooperation with LAFCO. The agency responded to LAFCO's written questionnaires and cooperated with LAFCO document and interview requests.

SERVICE DEMAND AND GROWTH

The District bounds encompass the City of Pleasant Hill, in addition to a portion of the City of Lafayette (single family residential), and small portions of the City of Walnut Creek (commercial) and the unincorporated community of Walden/Contra Costa Centre (commercial and multi-family residential). Land uses within the District are primarily residential, with some light industrial and commercial areas.

The District considers its customer base to be the landowners and residents of the District. There are approximately 16,000 households within the District, consisting of a population of approximately 40,000. The District is approximately 20 percent larger than the City of Pleasant Hill. The District's population density was 4,559 per square mile, compared with the 2009 countywide density of 1,473. The area has not experienced significant recent growth, as the District is almost built-out. Population growth is expected to increase at a rate similar to the City of Pleasant Hill, or in other words, at an annual rate of approximately 1.0 percent.[103] The estimated population of the District by 2025 is 46,863.

The only proposed development within the District is on the 27-acre Mangini Ranch property (located near the intersection of Taylor Boulevard and Pleasant Hill Road); however, the District

[103] Association of Bay Area Governments, Population Projections, 2009.

reported that there has not been a recent proposal for the land, and development has not moved forward in recent years.

The District is not a land use authority, and does not hold primary responsibility for implementing growth strategies.

MANAGEMENT

The District employs 27 full-time staff members, 82 part-time staff members and 290 seasonal employees. The staff report to the general manager who reports to the Board at monthly meetings. Under the general manager is one superintendent, seven supervisors and one contracted network administrator. The District evaluates employee performance on an annual basis. In addition, every January the District holds a board and staff study session to review prior year's goals, and set goals for the upcoming year.

Workload monitoring of staff is conducted on a routine basis by the appropriate supervisor (i.e. the park superintendent monitors the workload of park maintenance staff, the community center supervisors monitors community center staff, etc.), and the general manager oversees all 27 full-time staff members.

The District monitors performance and conducts benchmarking relative to other comparable recreation and park districts, such as the Hayward Area Recreation and Park District and the Livermore Area Recreation and Park District. The District also uses information made available by the California Association of Recreation and Park Districts to conduct benchmarking. Examples of benchmarking criteria used in evaluation include parkland acres per 1,000 population and recreation program participation per capita.

The District reported that it annually prepares audited financial statements. The most recent audited financial statement provided to LAFCO by the District was for FY 07-08.

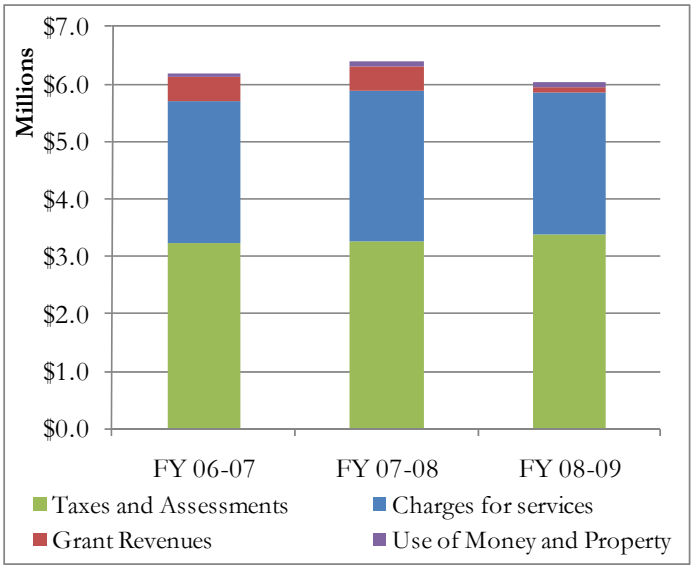
District planning efforts include an annual budget, a district summary profile and a recreation and parks master plan (2003), which contains an assessment of existing facilities and operations, and capital improvement planning for the future. The District's current planning efforts center on Bond Measure E, a $28 million general obligation bond for facility upgrades, approved by District residents in August 2009. As of January 2010, the District was in the process of forming a seven-member bond oversight committee to review the capital improvement budget expenditure plan, and monitor expenditures to ensure that funds are spent in accordance with Measure E.

The District has received numerous awards in recent years from the California Parks and Recreation Society, the California Association of Recreation and Park Districts (CARPD), and the California Special Districts Association (CSDA), including being honored as "California's Most Outstanding Recreation and Park District" by CARPD in 1994 and 2003. In March 2010, PHRPD received the District of Distinction accreditation by the Special District Leadership Foundation (SDLF). PHRPD is the first recreation and park district ever to achieve this award, which was based on a list of requirements involving policies, procedures, continuing education and audit standards.

FINANCING

The District's financial ability to provide services is constrained by available revenues and legal constraints on revenues. The District reported that its financial ability to provide services is adequate; however, budgets have become increasingly tighter in recent years, and the District relies on service revenues to fund maintenance of new facilities.

Figure 8-1: PHRPD Revenues, FY 06-07 through FY 08-09



The District received nearly $6.4 million in revenues in FY 07-08. PHRPD relies on property taxes and assessments, and service charges to fund services. Property taxes and assessments generated 51 percent of operating revenues in FY 07-08, and service charges generated 41percent.

Total expenditures for FY 07-08 were approximately $5.8 million, 17 percent of which were for parks, 15 percent for community center rental, 12 percent for facilities maintenance, 11 percent for athletics and teens, 10 percent for senior citizens, and the remaining 35 percent for all other programs, services and overhead.

The District's unrestricted net assets at the end of FY 07-08 were approximately $1 million. This amounted to 17 percent of the District's expenses in FY 07-08. The District does not have a formal policy on target financial reserves.

The District had approximately $2.9 million in long-term debt at the end of FY 07-08. The long-term debt consisted of 1998 and 2000 certifications of participation, in addition to loans and notes payable, and compensated absences. New long-term debt to be issued by the District pertains to Bond Measure E, a $28 million general obligation bond for new facilities and park upgrades. The District expects to sell the bonds in three series, starting in 2010, to fund construction of a new senior center, teen center, community center, upgrades to Pleasant Oaks Park, and replacing restrooms at park facilities.

PARKS AND RECREATION

NATURE AND EXTENT

PHRPD provides parks and recreation facilities, open space, and recreation programs and activities. All facility maintenance, including mowing and building maintenance, is performed directly. Recreation programs and classes are also offered directly by the District. The District offers over 2,300 enrichment classes, recreation programs and activities per year. Recreation

attendance in FY 08-09 was reported by the District to be approximately 1.4 million participant days, or roughly 35 participant days per resident.[104]

Table 8-3: PHRPD Recreation Attendance, FY 08-09

Activity	Attendance
Adult Classes and Events	16,948
Adult Sports	48,857
Aquatics	49,272
Pre-School	698,608
Rentals	57,762
Co-Sponsored Groups	265,195
Senior Programs	200,675
Youth Classes and Events	51,600
Youth Sports	6,216
Total	**1,395,133**

LOCATION

PHRPD provides park and recreation services within its boundary area, consisting of the City of Pleasant Hill, a portion of the City of Lafayette, and small portions of the City of Walnut Creek and the unincorporated community of Walden/Contra Costa Centre.

Non-residents may use park facilities on a drop-in basis; however, non-residents are charged higher fees for facility rentals and recreation classes. For facility rentals, the fee for non-residents is approximately 25 percent greater than the fee charged to district residents. For recreation programs and classes, the fees charged to non-resident are typically no more than $10 greater than the fees charged to district residents.[105] The District estimates that non-resident participation is highest among adult programs, where 40 to 50 percent of participants may be non-residents. In youth and children's programs, non-resident participation tends to be lower, with only 20 to 30 percent of participants being non-residents.

INFRASTRUCTURE

There are approximately 270 acres of parks and open space within PHRPD, including approximately 120 acres of parks directly maintained by the District (63 acres of which are developed), three pools, two community centers, a senior center complex, a cultural center, and a historical site.

The District shares two pool facilities with the Mt. Diablo Unified School District (MDUSD). PHRPD performs routine maintenance at both pool facilities, and MDUSD pays for utilities and other expenses related to operating the pools. The District also maintains the baseball/softball fields at Pleasant Hill Elementary School, College Park High School and Valley View High School. The District also owns a building for before and after school programs located at Gregory Gardens Elementary School. The District reported that it had more extensively shared facilities with schools in the past, but involvement with schools has decreased in recent years due to difficulties related to funding arrangements. PHRPD also shares a service center and maintenance yard facility with the City of Pleasant Hill.

[104] A participant day is defined as one person conducting one recreation activity in one day.

[105] The District reported that all fees are annually evaluated and updated as necessary.

Generally, there is a lack of developed parkland within the District. The City of Pleasant Hill General Plan establishes a standard of three acres of developed parkland per 1,000 residents.[106] Within PHRPD there is approximately 1.6 acres of developed parkland per 1,000 residents. A total of 120 developed acres, or 57 additional developed acres, would be needed to meet the General Plan standard. Including all district-maintained parkland (both developed and undeveloped), there are approximately three acres of parkland per 1,000 district residents.[107] The District has identified two possible locations for future parks, including a three-acre site adjacent to the Mangini Ranch property, and an eight-acre parcel southeast of the intersection of Boyd Road and Pleasant Hill Road.

Infrastructure needs and deficiencies within the District will be addressed by Measure E bond funds. The $28 million general obligation bond was approved by District residents in August 2009. Bond funds will be used to construct a new senior center, a new teen center, a new community center, upgrades to Pleasant Oaks Park, and better restroom facilities at Rodgers-Smith Park, Pleasant Hill Park and Brookwood Park. All projects are anticipated to be completed by 2015.

A recent infrastructure need addressed by the District was the renovation of the swimming pool at Pleasant Hill Aquatic Park, using funds from East Bay Regional Park District's Measure WW.

[106] City of Pleasant Hill General Plan, Community Development Element, 2003, p. 26.

[107] This includes approximately 20 acres of neighborhood parkland (0.5 acres per 1,000 residents) and approximately 100 acres of community parkland (2.5 acres per 1,000 residents).

Table 8-4: PHRPD Service Profile

PHRPD Park and Recreation Service Adequacy and Facilities						
Service Configuration						
Park Maintenance	Direct	Recreation Programming			Direct	
Service Adequacy[1]						
Maintained Park Acres	120.1	Maintained Park Acres per 1,000			3.0	
Active Parkland	37.4	Active Parkland per 1,000			0.9	
Passive Parkland	232.2	Passive Parkland per 1,000			5.8	
Rec. Attendance FY 08-09	1,395,133	Recreation Attendance per Resident			35	
Recreation Cost per Resident	$97.80	Park Maintenance Cost per Acre			$9,232	
Recreation Facilities and Parks						
Name	**Location**	**Property Owner**	**Park Type[1]**	**Facilities**	**Condition**	**Acres**
Pleasant Hill Community Center	320 Civic Dr., Pleasant Hill	PHRPD	Active	Large and small meeting rooms	Fair/Poor	2.3
Pleasant Hill Senior Center	233 Gregory Ln., Pleasant Hill	PHRPD	Active	Hall with kitchen and patio	Fair/Poor	NA
Winslow Center	2590 Pleasant Hill Rd., Pleasant Hill	PHRPD	Active	Single large hall with stage	Fair	3.1
Plesant Hill Park	147 Gregory Ln., Pleasant Hill	PHRPD	Active	Baseball diamond, volleyball, basketball, 3 playgrounds, picnic areas	Fair	16.5
Rodgers-Smith Park	Grayson Rd., Pleasant Hill	PHRPD	Active	Picnic and BBQ area, sports field, volleyball, basketball, bocce	Good	4.5
Pleasant Hill Aquatic Park	147 Gregory Ln., Pleasant Hill	PHRPD	Active	2 pools, sprayground, picnic areas	Good	NA
College Park Pool	201 Viking Dr., Pleasant Hill	MDUSD	Active	Pool	Poor	NA
PH Education Center Pool	One Santa Barbara Rd., Pleasant Hill	MDUSD	Active	Pool	Fair	NA
Paso Nogal Park	Paso Nogal Rd., Pleasant Hill	PHRPD	Passive	Turfed meadow, open space, trails, off-leash dog park	Good	63.0
Pleasant Oaks Park	Near Pleasant Hill Adult Center	PHRPD	Active	Sports fields, tot lot	Fair	11.0

continued

Recreation Facilities and Parks Name	Location	Property Owner	Park Type[1]	Facilities	Condition	Acres
Brookwood Park	Taylor Blvd. and Withers Ave., Plesant Hill	PHRPD	Passive	Picnic and BBQ area, exercise course, basketball and tot lot	Good	6.3
Frank Salfingere Park and Community Center	Taylor Blvd. and Ruth Dr., Pleasant Hill	PHRPD	Passive	Turf area	Good	1.5
Pinewood Park	Near Strandwood Elementary School	PHRPD	Passive	Tot lot	Good	0.3
Chilpancingo Park	Golf Club Rd., Pleasant Hill	PHRPD	Passive	Turf area	Good	2.5
Shadowood Park	Spart Ct. off Camelback Road, Pleasant Hill	PHRPD	Passive	Turf, picnic/BBQ area, tot lot	Good	2.6
Shannon Hills Park	Devon Ave., Pleasant Hill	PHRPD	Passive	Turf, tot lot, natural creek	Good	2.5
Rodgers Ranch	315 Corstsen Rd., Plesant Hill	PHRPD	Passive	Historical Site and Farm	Fair	2.1
School House	2050 Oak Park Blvd., Pleasant Hill	PHRPD	Passive	Theatre, Meeting Rooms	Poor	1.9
Dinosaur Hill Park	Off Taylor Blvd., Pleasant Hill	PHRPD	Passive	Open space, trails	Good	13.0
Ridgeview Open Space Area	Paso Nogal Rd., Pleasant Hill	City of Pleasant Hill	Passive	Hiking trails	Good	56.0
Contra Costa Canal Trail	From Concord to Walnut Creek and through Pleasant Hill	EBRPD	Passive	Hiking/riding trail	Good	11.5
Las Juntas	West of Lucille Ave., Pleasant Hill	PHRPD	Passive	Open space	Good	7.0
Valley High II	Falls Ct., Parkhaven Dr., Cliffside Dr., Pleasant Hill	PHRPD	Passive	Primarily open space, some turf	Good	12.1
Valley High IV	Verbana Ct. and Elderwood Dr., Pleasant Hill	PHRPD	Passive	Open space	Good	11.0
Valley High V	Valley High Dr. at Marello Dr., Pleasant Hill	PHRPD	Passive	Open space	Good	4.6
Woodside Hills I	Heritage Hill Dr., Pleasant Hill	PHRPD	Passive	Open space	Good	22.0
Woodside Hills III	Grayson Rd., Heritage Meadows Rd., Woodside Meadows Rd., Pleasant Hill	PHRPD	Passive	Open space	Good	12.3

Notes:

(1) Active parkland consists of developed parkland with active recreation programming and sports facilities, such as active ball courts (e.g., basketball or tennis), delineated sports fields (e.g., soccer, baseball, softball), aquatic facilities, and gymnasiums. Passive parkland consists of developed or undeveloped parkland containing trails, walkways, cultural or scenic resources, open fields, picnic tables/shelter, tot lots, etc., but not containing facilities used for active recreation programming.

Figure 8-2: PHRPD Park Facilities

GOVERNANCE ALTERNATIVES

PHRPD primarily provides recreation and park service to the City of Pleasant Hill. Although the District meets the legal requirement for establishment of a subsidiary district (of the City of Pleasant Hill) based on land area and registered voters, the District has functioned as an independent agency since 1951 and continues to provide adequate services to taxpayers. There is no evidence to suggest that the District would necessarily be better run, or residents provided better services, if the City ran the district or provided recreation and park services directly.

As a boundary clean-up, there are approximately 16 acres of the City of Pleasant Hill located outside of the boundaries of PHRPD, north of Chilpancingo Parkway, in the northern portion of the City. To be consistent with the remainder of the City, this area should be included within the SOI of PHRPD, and eventually annexed into the District.

There are also portions of the cities of Lafayette (113 acres) and Walnut Creek (14 acres) within PHRPD. In areas were PHRPD boundaries overlap city boundaries there would appear to be a duplication of services, as both PHRPD and the cities of Lafayette and Walnut Creek provide park and recreation services. However, the Brookwood park is located immediately adjacent to the Lafayette city limits, and many residents of the City of Lafayette use this park facility.

AGENCY MSR DETERMINATIONS

GROWTH AND POPULATION PROJECTIONS

1) There are approximately 16,000 households within the District, consisting of a population of approximately 40,000. The area has not experienced significant recent growth, as the District is almost entirely built-out. Population growth is expected to increase at a rate similar to the City of Pleasant Hill, or in other words, at an annual rate of approximately 1.0 percent. The estimated population of the District by 2025 is 46,863.
2) The only proposed development within the District is on the 27-acre Mangini Ranch property; however, there has not been a recent proposal for the land, and development has not moved forward in recent years.

PRESENT AND PLANNED CAPACITY OF PUBLIC FACILITIES AND ADEQUACY OF PUBLIC SERVICES, INCLUDING INFRASTRUCTURE NEEDS AND DEFICIENCIES

3) There are approximately 270 acres of parks and open space within PHRPD, including approximately 120 acres of parks directly maintained by the District (63 acres of which are developed). Recreation facilities include three pools, two community centers, a senior center complex, a cultural center, and a historical site.

4) Generally, there is a lack of developed parkland within the District. The City of Pleasant Hill General Plan establishes a standard of three acres of developed parkland per 1,000 residents. Within PHRPD there is approximately 1.6 acres of developed parkland per 1,000 residents. A total of 120 developed acres, or 57 additional developed acres, would be needed to meet the General Plan standard.

5) Counting all district-maintained parkland (both developed and undeveloped), there are approximately three acres of parkland per 1,000 district residents, including approximately 20 acres of neighborhood parkland (0.5 acres per 1,000 residents) and approximately 100 acres of community parkland (2.5 acres per 1,000 residents).

6) There is a significant amount of recreational programming offered within PHRPD. The estimated attendance for all recreation programs in FY 08-09 was approximately 1.4 million participant days, or roughly 35 participant days per resident.

7) Significant infrastructure needs within the District will be addressed through Measure E bond funds. Bond funds will be used to construct a new senior center, a new teen center, a new community center, upgrades to Pleasant Oaks Park, and better restroom facilities at Rodgers-Smith Park, Pleasant Hill Park and Brookwood Park. All projects are anticipated to be completed by 2015.

8) The district has conducted capital improvement planning through the 2003 recreation and parks master plan. The District's current planning efforts center around Bond Measure E. As of January 2010, the District was in the process of forming a seven-member bond

oversight committee to review the capital improvement budget expenditure plan, and monitor expenditures to ensure that funds are spent in accordance with Measure E.

FINANCIAL ABILITY OF AGENCIES TO PROVIDE SERVICES

9) The District reported that the current level of financing is generally sufficient for adequate service provision; however, budgets have become increasingly strained in recent years. The District indicated that it plans to participate in the Proposition 1A Securitization Program to mitigate the impact of the loss of property tax revenues borrowed by the State.

10) The financial ability of the agency to provide service was improved significantly with the passage of Bond Measure E in August 2009. The $28 million general obligation bond was approved by nearly 76 percent of district residents.

11) The District reported that all fees are annually evaluated and updated as necessary.

STATUS OF, AND OPPORTUNITIES FOR, SHARED FACILITIES

12) PHRPD shares two pool facilities with the MDUSD. PHRPD performs routine maintenance at both pool facilities, and MDUSD pays for utilities and other expenses related to operating the pools. The District also maintains the baseball/softball fields at Pleasant Hill Elementary School, College Park High School and Valley View Middle School.

13) The District also owns a building for before and after school programs located at Gregory Gardens Elementary School, and shares a service center and maintenance yard facility with the City of Pleasant Hill.

14) No additional or future opportunities for shared facilities were identified.

ACCOUNTABILITY FOR COMMUNITY SERVICE NEEDS, INCLUDING GOVERNMENTAL STRUCTURE AND OPERATIONAL EFFICIENCIES

15) The District demonstrated accountability and transparency by disclosing financial and service related information in response to LAFCO requests.

16) Constituent outreach activities conducted by the District include an email newsletter and a catalog of district programs, activities and events sent out three times a year, an email news bulletin with current information about the District, and a website that includes up-to-date listings of special events, activities and classes.

17) The District has received numerous awards in recent years from the California Parks and Recreation Society, the CARPD, and the CSDA, including being honored as "California's Most Outstanding Recreation and Park District" by CARPD in 1994 and 2003. In March 2010, PHRPD received the District of Distinction accreditation by the Special District Leadership Foundation (SDLF).

SOI RECOMMENDATIONS AND DETERMINATIONS

LAFCO adopted an MSR for PHRPD in 2004, and discussed an SOI update to include the unincorporated community of Pacheco, but did not take action on the SOI at that time. LAFCO staff assume that the existing SOI is coterminous with PHRPD bounds based on previous boundary changes, but no SOI adoption resolution is contained in the LAFCO records.

AGENCY PROPOSAL

The agency reported a desire for an SOI including the existing district boundaries, and the areas included within the SOI for the City of Pleasant Hill.

SOI OPTIONS

Given the considerations addressed in the Municipal Service Review, three options are identified for the PHRPD SOI:

SOI Option #1 – SOI expansion to City of Pleasant Hill SOI

If LAFCO determines that the existing government structure is appropriate, then an SOI that includes the existing district boundaries, and the areas included within the SOI for the City of Pleasant Hill, should be adopted. This would allow the District to plan for its boundary area, and for future areas likely to be annexed to the City of Pleasant Hill. Included within this SOI option is 16 acres of the City of Pleasant Hill, located north of Chilpancingo Parkway, currently outside of PHRPD boundaries.

SOI Option #2 – SOI expansion to City of Pleasant Hill boundaries

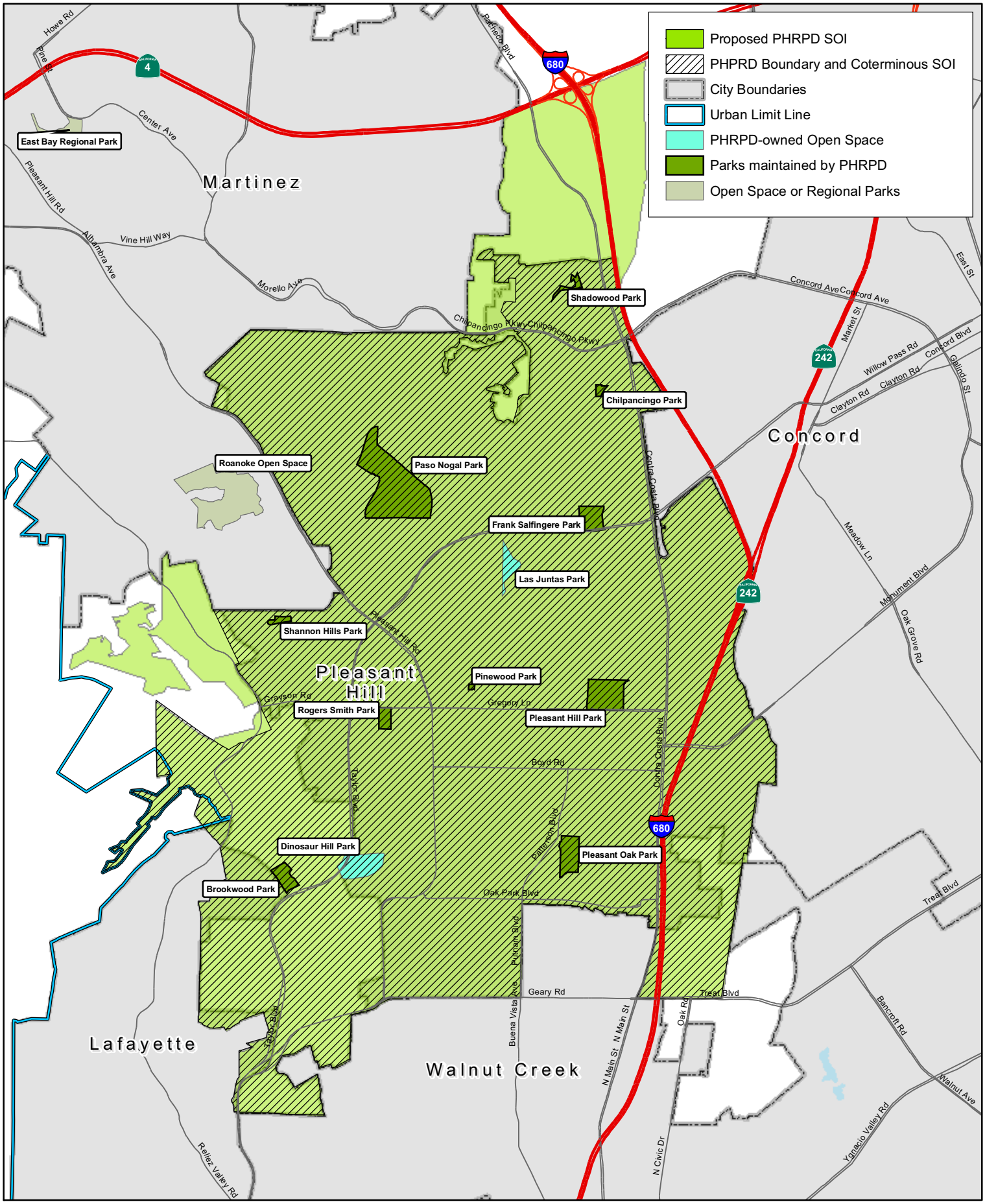
This option would set an SOI consistent with the current boundaries of PHRPD and the City of Pleasant Hill, but would exclude areas within the existing City of Pleasant Hill SOI. Such an SOI would be appropriate if LAFCO believes that future annexations to the City will not also join PHRPD.

SOI Option #3 – SOI reduction, excluding City of Lafayette and City of Walnut Creek

This option would exclude the boundaries of the City of Lafayette and the City of Walnut Creek. This SOI option is appropriate because both cities already provide park and recreation services to their residents. A slight variation on this option would be to only exclude the southern portion of the City of Lafayette from the PHRPD SOI, because the northern portion is located immediately adjacent to Brookwood Park, and residents of this area visit the park frequently due to the proximity.

Map 8-2

PHRPD SOI Expansion: Option One



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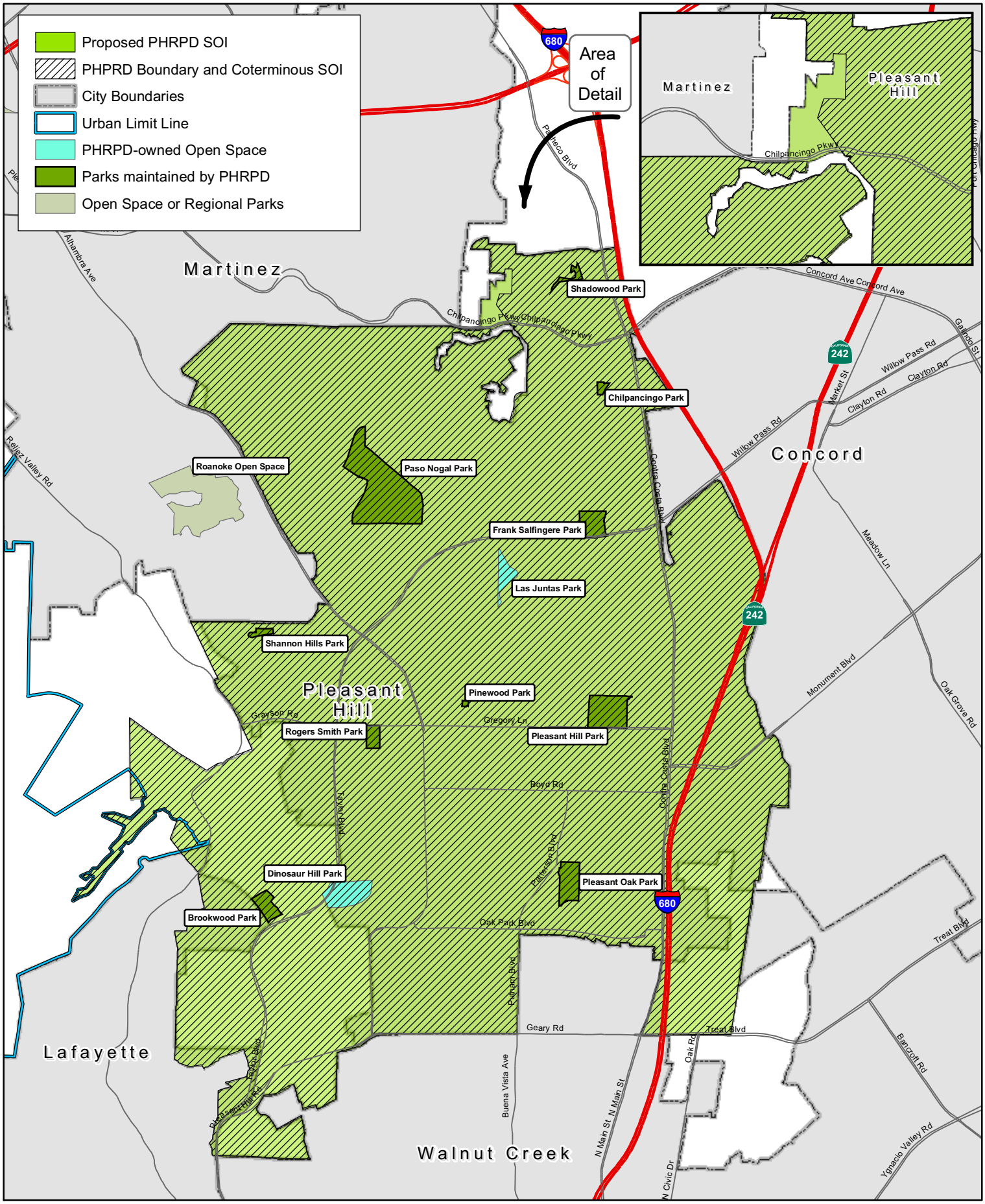
Map 8-3

PHRPD SOI Expansion: Option Two



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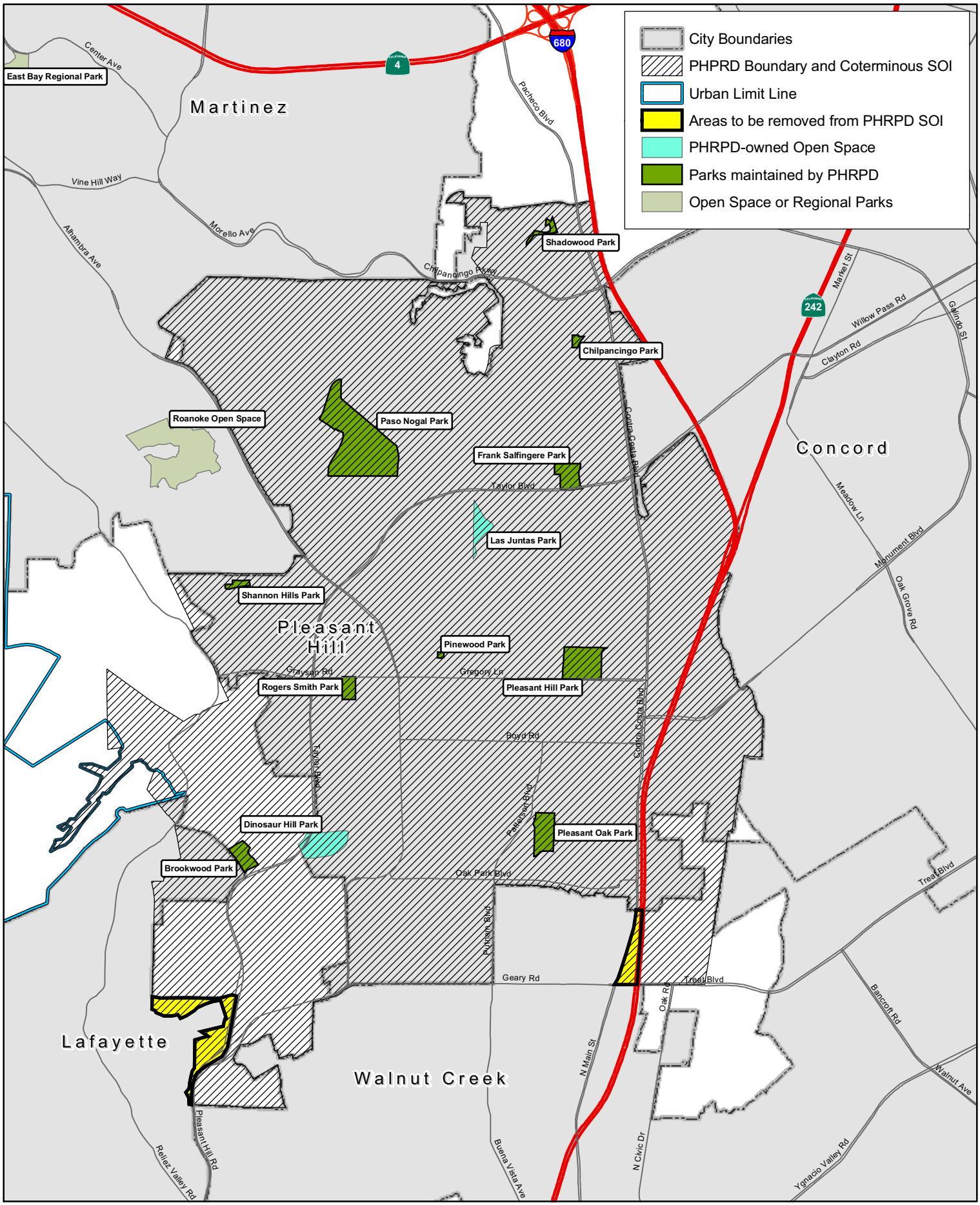
Map 8-4

PHRPD SOI Reduction: Option Three



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RECOMMENDATION

It is recommended that LAFCO adopt an SOI for PHRPD that includes the district's existing boundaries, in addition to an SOI expansion that includes the SOI of the City of Pleasant Hill (including 16 acres of the City currently located outside of PHRPD), but excludes the portions of the cities of Lafayette and Walnut Creek that are not served by PHRPD parks (i.e. the City of Lafayette area immediately adjacent to Brookwood Park would remain within the PHRPD SOI). Such an SOI would allow the District to conduct planning in conjunction with planned growth for the City of Pleasant Hill, in addition to the existing boundary area of the District, but would signal that the portions of the Lafayette and Walnut Creek city limits within PHRPD that are not served by PHRPD parks should be detached from the district.

It is not clear from the LAFCO record how portions of the cities of Lafayette and Walnut Creek came to be included within PHRPD, but it is likely that these areas were unincorporated at formation of PHRPD and were not detached from the district when they were annexed to the cities. The northern portion of the City of Lafayette within PHRPD is located immediately adjacent to PHRPD's Brookwood Park, and Lafayette residents in this area likely visit the park frequently due to the proximity.

Detaching the portions of the City of Lafayette and City of Walnut Creek that are not served by PHRPD parks would result in a loss of approximately $9,676 in property tax revenue per year to PHRPD, based on FY 07-08 allocations.[108]

Table 8-5: PHRPD SOI Analysis

Issue	Comments
SOI update recommendation	Adopt an SOI for PHRPD that includes the district's existing boundaries, in addition to an SOI expansion that includes the SOI of the City of Pleasant Hill (including 16 acres of the City currently located outside of PHRPD), but excludes the cities of Lafayette and Walnut Creek.
Services provided	The District directly provides park maintenance and recreation programming.
Present and planned land uses in the area	The District bounds encompass the City of Pleasant Hill, in addition to a portion of the City of Lafayette (single family residential), and small portions of the City of Walnut Creek (commercial) and the unincorporated community of Walden/Contra Costa Centre (commercial and multi-family residential). Land uses within the District are primarily residential, with some light industrial and commercial areas. Land use in the City of Pleasant Hill SOI area to the north of the City (along Pacheco Boulevard) are residential and light industrial.

[108] In FY 07-08, the City of Walnut Creek Tax Rate Area (TRA 9080) within PHRPD paid $5,467 to the District, and the City of Lafayette TRAs (14031 and 14041) within PHRPD paid $4,209 and $37,458, respectively. City of Lafayette TRA 14031 is recommended for exclusion from the SOI, while TRA 14041 is located adjacent to Brookwood Park and is recommended to stay within the PHRPD SOI.

Projected growth in the District/Recommended SOI	Projected growth is anticipated to be consistent with the City of Pleasant Hills, or in other words, approximately 1.0 percent per year. The estimated population of the District by 2025 is 46,863.
Present and probable need for public facilities and services in the area	There is a present and probable need for park and recreation services in the City of Pleasant Hill area and adjacent areas.
Opportunity for infill development rather than SOI expansion	The recommended SOI update is consistent with the adopted SOI for the City of Pleasant Hill. PHRPD is largely built-out, so significant SOI expansions in the future seem unlikely.
Service capacity and adequacy	There are approximately 270 acres of parks and open space within PHRPD, including approximately 120 acres of parks directly maintained by the District (63 acres of which are developed). Within PHRPD there is approximately 1.6 acres of developed parkland per 1,000 residents. A total of 120 developed acres, or 57 additional developed acres, would be needed to meet the City's General Plan standard of three developed park acres per 1,000 residents. There is a significant amount of recreational programming offered within PHRPD. The estimated attendance for all recreation programs in FY 08-09 was approximately 1.4 million participant days, or roughly 35 participant days per resident.
Social or economic communities of interest	The primary community of interest is the City of Pleasant Hill. Other communities of interest include the residents of the City of Lafayette and the unincorporated community of Walden/Contra Costa Centre within PHRPD, in addition to the commercial area within the City of Walnut Creek in PHRPD bounds.
Effects on other agencies	There would be no direct effects on other agencies; however, PHRPD would lose approximately $47,000 in property tax revenue per year with the eventual detachment of the portions of the City of Lafayette and City of Walnut Creek.
Potential for consolidations or other reorganizations when boundaries divide communities	The boundaries of PHRPD are largely consistent with the boundaries of the City of Pleasant Hill. With the eventual detachment of the portions of the City of Lafayette and the City of Walnut Creek, PHRPD will not divide communities. PHRPD could potentially be established as a subsidiary district of the City of Pleasant Hill, but there is no evidence that such a governance alternative would improve services to residents of the District or City.
Location of facilities, infrastructure and natural features	District park and recreation facilities are located throughout the district boundaries. The Pleasant Hill area is located on a large alluvial plain extending from the Briones Hill to the west.
Willingness to serve	PHRPD indicated a willingness to continue providing park maintenance and recreation programming for the foreseeable future.
Potential effects on agricultural and open space lands	No potential effects on agriculture or open space lands were identified.

Potential environmental impacts	Although no potential environmental impacts were identified in the MSR, the LAFCO counsel and planner should make CEQA determinations.

9. ROLLINGWOOD-WILART PARK RECREATION AND PARK DISTRICT

Rollingwood-Wilart Park Recreation and Park District (RWPRPD) operates and maintains a recreation center for recreation programs and community events.

AGENCY OVERVIEW

FORMATION AND BOUNDARY

RWPRPD was formed on October 29, 1956 as an independent special district. The District was formed to operate and maintain the Rollingwood Recreation Center.

The principal act that governs the District is the Recreation and Park District Law.[109] The principal act empowers Recreation and Park Districts to 1) organize, promote, conduct, and advertise programs of community recreation, including, but not limited to, parks and open space, parking, transportation, and other related services that improve the community's quality of life, 2) establish systems of recreation and recreation facilities, including, but not limited to, parks and open space, and 3) acquire, construct, improve, maintain, and operate recreation facilities, including, but not limited to, parks and open space, both inside and beyond the district's boundaries.[110] Districts must apply and obtain LAFCO approval to exercise latent powers, that is, those services authorized by the principal act but not provided by the district by the end of 2000.[111]

The District's boundary is located entirely within unincorporated Contra Costa County, bordered by the City of San Pablo in the south and west, the City of Richmond to the north, and I-80 to the east, as shown in Map 9-1. The boundaries encompass approximately 0.17 square miles, or roughly 109 acres.[112] Contra Costa is the principal county and Contra Costa LAFCO has jurisdiction.

The District was interviewed by LAFCO as part of the 2003-04 MSR cycle; however, LAFCO minutes from June 9, 2004 indicate that the MSR for the District was deferred and an SOI update was never initiated. No SOI adoption resolution is contained in the LAFCO records, and the existing SOI for the District could not be ascertained.

[109] California Public Resources Code §5780-5791

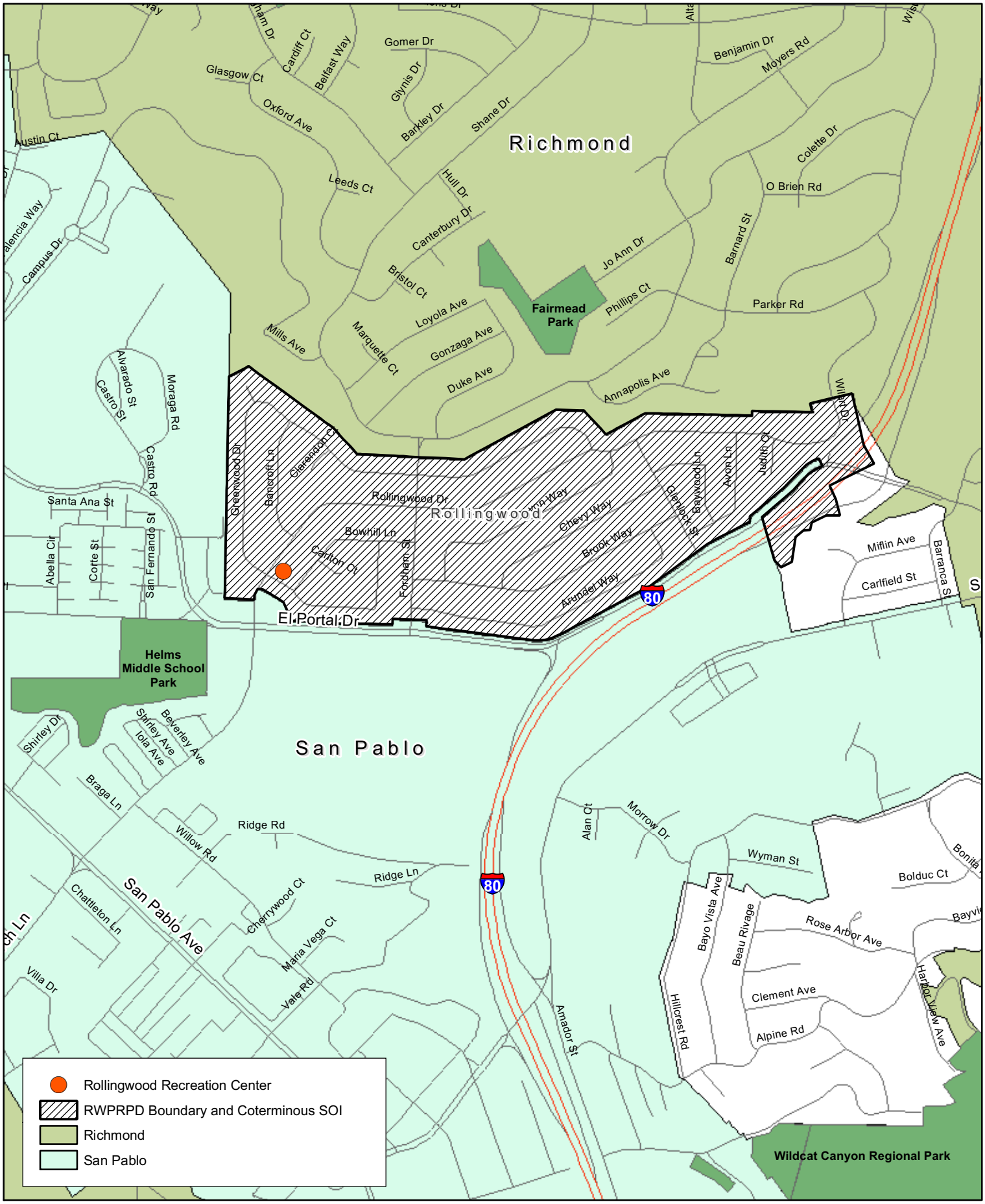
[110] California Public Resources Code §5786.

[111] Government Code §56824.10.

[112] Contra Costa LAFCO: West County Sub-Regional MSR, Final Draft November 2009, Page VI-11.

Map 9-1

Rollingwood-Wilart Recreation and Park District and Coterminous Sphere of Influence



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Boundary History

There have been six boundary changes to RWPRPD since formation in 1956, all consisting of detachments from the District. All six detachments from RWPRPD occurred in conjunction with annexations to the City of San Pablo.

Table 9-1: RWPRPD Boundary History

Project Name	LAFCO Reso./Date	Change Type	Acres[1]	Recording Agency[2]
Formation	10/29/1956	Formation	NA	BOE
Pre-LAFCO Reorganization	3/21/1958	Detachment	NA	BOE
Pre-LAFCO Reorganization	3/23/1965	Detachment	NA	BOE
Taylor Detachment	2/4/1970	Detachment	1.1	Both
El Portal Detachment	1/4/1978	Detachment	2.2	Both
Bohannon Boundary Reorganization	6/7/1978	Detachment	0.7	Both
El Portal Corridor Reorganization	02-40	Detachment	26.7	Both

Notes:
(1) NA indicates that acreage is not available in the LAFCO records.
(2) Recording agency indicates whether Contra Costa LAFCO or the Board of Equalitzation (BOE) maintains records of the particular boundary change.

LOCAL ACCOUNTABILITY AND GOVERNANCE

The District has been governed by a three-member board since 1999. The District reported that it reduced the number of board members from five to three on September 8, 1999, and notified Supervisor Gioia of the change by hand-delivering a letter to his office, although return correspondence from the County was never received by the District.[113] The District reported that the change to a smaller board was sought due to a lack of constituent interest in serving on the board after two board members passed away in 1999. However, the principal act requires that recreation and park districts have at least a five-member board,[114] and there is no provision in the law for decreasing the number of board members to less than five.[115] For that reason, Table 9-1 lists two vacancies on the five-member board of RWPRPD, and a recommendation of this MSR is that the vacancies be filled pursuant to Sections 1779-1780 of the Government Code.

For contested elections, board members are elected by registered voters within the District to staggered four-year terms; however, County Elections data shows that there has only been one contested election since 1979, occurring on November 3, 1987. Uncontested vacancies on the

[113] Interview with Charlotte Rude, Director, RWPRPD, November 24, 2009. The District also notified the County Elections Division of the change, to request that two board members be elected instead of three at one election, and that one board member be elected instead of two at the following election.

[114] California Public Resources Code §5784.

[115] California Public Resources Code §5784.2, and interview with Henry Agonia, Executive Director, California Association of Recreation and Park Districts, November 17, 2009.

governing body are filled by appointment. RWPRPD board members receive compensation of $599 per year for attending board meetings.

Table 9-2: RWPRPD Governing Body

Rollingwood-Wilart Park Recreation and Park District				
Governing Body				
Members	**Name**	**Position**	**Began Serving**	**Term Expires**
	Bennie Quintana	Director	NP	2012
	Jennifer Brayfield	Director	2009	2010
	Charlotte Rude	Director	NP	2012
	Vacant	Director	NA	NA
	Vacant	Director	NA	NA
Manner of Selection	Elections at large or by appointment when uncontested			
Length of Term	Four years			
Meetings	Date: First Wednesday of the month at 8:00 a.m.		Location: 2395 Greenwood Dr., San Pablo, CA 94806	
Agenda Distribution	Posted at Rollingwood Community Center			
Minutes Distribution	By request			

The District conducts constituent outreach activities by posting agendas and notices at the Rollingwood Recreation Center, and by posting information on the facility's marquee. Local community groups (such as Narcotics Anonymous and the Boy Scouts) assist in constituent outreach by distributing flyers and notices to all residences in the community in exchange for the use of the Rollingwood Recreation Center for meetings.

With regard to customer service, complaints may be filed with the Board by phone or in writing. The District reported that there were no complaints submitted in FY 08-09. Complaints typically relate to noise issues during parties at the recreation center, but the District has addressed this issue by educating the community about the noise policy and maintaining strict enforcement of curfews on parties.[116]

The District demonstrated limited accountability in its disclosure of information and cooperation with LAFCO. The agency did not responded to LAFCO's initial written questionnaire in a timely manner, but did ultimately submit the RFI at an in-person interview. The District did not provide follow-up comments or participate in the agency review process. Numerous calls and emails to the District soliciting comments went unanswered.

SERVICE DEMAND AND GROWTH

The District bounds encompass an entirely urban residential area. There is no significant business activity within the District.

[116] The District reported that all noise or music from a party must be halted by 11 p.m. at the latest, and the premises must be completely vacated by midnight. The security officer on hand is authorized to enforce these policies, or else the customer risks forfeiting their deposit.

The District considers its customer base to be the residents of the 733 homes within the District. There were approximately 2,382 residents in the District, according to 2009 Department of Finance data.[117] The District's population density was 14,013 per square mile, compared with the countywide density of 1,473. The area has not experienced significant recent growth due to the fact that it is entirely built-out, and the District reported no growth-related concerns. Population is expected to increase at a rate similar to the adjacent City of San Pablo, or in other words, population is expected to increase by three percent by 2025, at an annual rate of approximately 0.2 percent.[118] The estimated population within RWPRPD by 2025 is 2,460.

The District reported that service demand is most dependent upon the state of the economy, and service demand has decreased sharply over the last year. The District rents out the Rollingwood Recreation Center for parties on Saturdays only, but has averaged only one rental per month over the last six months. In prior years, the District reported that it was not uncommon for the recreation center to be rented out three or four Saturdays per month, with reservations coming in over a year in advance. The majority of the parties held at the Rollingwood Recreation Center are birthday parties for teens (quinceañeras, etc.) or older individuals (50th through 80th birthdays).

In addition to serving Rollingwood and Wilart Park residents, the District reported that it often rents the recreation center out to individuals from Richmond and San Pablo, and in the past has also provided service to residents of Pinole, Hercules, Rodeo, and El Sobrante. In many cases, the recreation center was rented by former residents of the District, or by individuals who had friends and family in the Rollingwood-Wilart Park area.

The District is not a land use authority, and does not hold primary responsibility for implementing growth strategies.

MANAGEMENT

The District has no permanent staff, but employs a building manager and janitor by contract. Both individuals receive $300 per month for their services. The janitor reports to the building manager, who reports to the Board at monthly meetings. The building manager is also a board member.[119] The janitor typically cleans the recreation center once or twice per week, depending on facility usage. The building manager routinely evaluates the janitor's performance by inspecting the

[117] Population estimate is based on the 2009 population per household for the City of San Pablo (3.25), according to the Department of Finance.

[118] Contra Costa LAFCO: West County Sub-Regional MSR, Final Draft November 2009, Page VI-12.

[119] A special district of limited powers has only those powers given to it by its enabling statutes or other legislation applicable to that district and cannot exceed those powers. Some enabling statutes specifically address whether members of the governing board can serve as staff, others are silent on this issue. If a district's enabling statutes specifically allow a board member to serve as staff, this practice may be permissible. However, in the absence of specific statutory authorization, this practice may result in a prohibited legal conflict of interest or incompatible activity. A conflict of interest can have serious legal consequences for the board member involved. It is recommended that all districts whose board members serve as staff, consult with their legal counsel regarding the statutory authority for such dual service, and ask legal counsel to evaluate whether any prohibited conflicts of interest, incompatible activities or other legal problems might arise from this arrangement.

cleanliness of the recreation center following events.[120] Minor repairs and odd jobs at the recreation center are often performed directly by the board members to minimize costs. The District has benefitted by having board members with plumbing, carpentry and electrician experience.

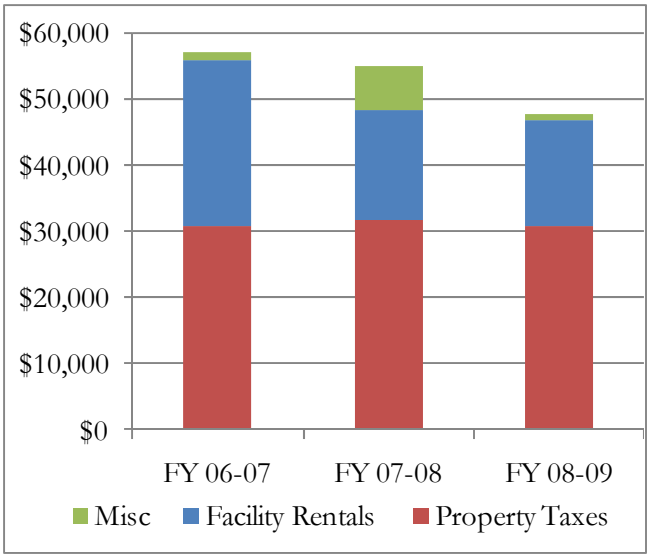
The District reported that it adopts an annual budget, but has not conducted a financial audit in the last 10 years due to financial constraints.[121] Additionally, many of the District's records were damaged in a vandalism incident during a break-in at the recreation center. A goal of the District for FY 09-10 is to resume the practice of annual financial audits, and perform back-audits for the last 10 years.

Capital planning efforts are conducted on a year-to-year basis through the annual budget, and capital needs are discussed routinely at meetings. The District does not prepare a capital improvement plan for significant facility improvements.

FINANCING

The District's financial ability to provide services is constrained by available revenues, but is sufficient to provide basic operations and maintenance services to the Rollingwood Recreation Center.

Figure 9-1: RWPRPD Revenues, FY 06-07 through FY 08-09



The District received $55,059 in revenues in FY 07-08. Revenues received by the District consist primarily of property taxes and fees for service. Property taxes generated 58 percent of operating revenues in FY 07-08, and fees for service generated 30 percent. The District also received revenue from miscellaneous sources, consisting of 12 percent of total revenues in FY 07-08.[122] The District's total revenues decreased by nearly 17 percent from FY 06-07 to FY 08-09, primarily due to a decrease in facility rental revenue by 37 percent over the time period.

Total expenditures for FY 07-08 were $33,518. The District did not report what the specific expenses in FY 07-08 consisted of; however, the adopted budget for FY 09-10 reports

[120] The building manager resides within close proximity to the Rollingwood Recreation Center, and is therefore able to keep a close eye on facility rentals and usage. For example, the building manager knows if a party has violated curfew, even if there are no noise complaints, because music and noise can be heard from the building manager's house.

[121] The most recently performed audit was conducted by Contra Costa County; however, the District reported that when the price of an audit increased from $1,000 per year to $3,000 per year, the District could no longer afford to have them done. The District is currently trying to find an auditor who will charge between $1,000 and $1,500 per year.

[122] The District did not disclose what the miscellaneous revenue sources consisted of.

expenditures of $30,000, consisting of 42 percent for utilities, 24 percent for building management and janitorial contract services, 22 percent for inspections and insurance, two percent for compensation to the board of directors, and 10 percent for other miscellaneous expenditures (supplies, advertising, etc.).

Property taxes are collected by the County and held in a separate fund for the District. Most regular or significant expenditures for the District are paid by check/warrant through the County, although the District does maintain a separate checking account for miscellaneous expenditures and holding deposits for facility rentals. The District does not have a formal reserve policy, but tries to maintain at least $2,000 in the District checking account for emergencies. The District also has reserves of $18,540 held by the County. The District reported that it had no long-term debt at the end of FY 08-09, and that bills for utilities and other regular expenditures were pre-paid for six months of FY 09-10.

The District tries to keep fees as low as possible, and charges the same fees to all users regardless of whether they reside in the District or not. For parties (Saturday rentals only), the District charges $125 per hour, with a five hour minimum rental. The District has not raised fees since 2003. The District also charges $25 per hour for security (required by the District for most large parties or events), and a $500 deposit. Community groups such as the Boy Scouts, Narcotics Anonymous and children's dance lessons are allowed free weekly usage of the facility, and other groups (an adult square dancing class and weight-loss meetings) are charged $20 per usage. Private recreation classes are allowed to use the facility with approval from the board, for a fee ranging from $20 to $125 depending on the length and size of the class. The District allows funerals for District residents to be held at the recreation center free of charge.

PARKS AND RECREATION SERVICE

NATURE AND EXTENT

RWPRPD operates and maintains the Rollingwood Recreation Center for recreation programs and community events. The District does not directly provide recreation activities, but allows for community events and organizations to use the facility and low cost or no cost.

The District estimates that yearly attendance at the Rollingwood Recreation Center is approximately 22,280, or roughly 9.4 attendees per District resident per year. Approximately one-third of this amount is from facility rentals for private parties, one-third is from youth Latin dance classes held twice per week, approximately 20 percent is from weekly meetings of Narcotics Anonymous, and the remaining is from funerals (five percent), weekly meetings for Take Off Pounds Sensibly (TOPS) (four percent), adult square dance (three percent), Boy Scouts (one percent), and use by the neighboring Lutheran Church (one percent).

The District employs a building manager by contract to oversee the facility and coordinate facility rentals and maintenance. The District also employs a janitor by contract that cleans the facility on a weekly basis, and after special events and facility rentals. Significant maintenance or capital improvements are performed by contract on a case-by-case basis, and routine maintenance is performed directly by the board members.

The District reported that it frequently collaborated with the Rollingwood Improvement Association, but since the organization was disbanded in 2001, RWPRPD board members have also served as a de facto community resource. The District reported that it often gets calls from community members reporting abandoned or illegally parked vehicles, speeding vehicle traffic, garbage or litter cleanup needs, or suspected criminal activity, which the District forwards to the appropriate channels at the County.

LOCATION

RWPRPD allows the Rollingwood Recreation Center to be used by District residents and non-residents alike. The District charges the same fees to all users regardless of whether they reside in the District or not.[123] In addition to serving Rollingwood and Wilart Park residents, the District also occasionally serves residents of Richmond, San Pablo, Pinole, Hercules, Rodeo, and El Sobrante.

INFRASTRUCTURE

The District's key infrastructure consists of the Rollingwood Recreation Center, located at 2395 Greenwood Drive, in the unincorporated community of Rollingwood. The recreation center was built in 1954, and the District reports that it is currently in good condition, due to consistent maintenance over the years. The recreation center has a large open floor area and stage, a kitchen area and janitor's closet, men's and women's restrooms, a drinking fountain, a small meeting room attached to the entryway, a storage room on the ground floor and a meeting/storage room on the second floor.

In terms of infrastructure needs and deficiencies, upcoming capital needs planned by the District include improving accessibility of the restroom facilities ($15,000) and improving ventilation for the janitor's closet ($5,000). Other needed improvements include fireproofing or replacing the curtains on the stage, resurfacing and painting of stall lines in the parking lot, and purchasing a sound (microphone and speaker) system. In FY 08-09 the District spent $30,000 to replace the stove hood in the kitchen, which was an extremely significant expenditure for the small district.

The posted capacity of the facility is 266 persons for a standing or dance event, and 124 persons for a banquet or seated event. The District indicated that the largest events held at the Rollingwood Recreation Center are typically parties, with attendance as high as 200 per event. The District did not identify any problems with existing building capacity, and does not have plans to increase capacity at the facility.

The District did not identify any current opportunities for facility sharing, but did report that 10 years ago it contracted with the City of San Pablo to use the recreation center when a City facility was being retrofitted. The Rollingwood Recreation Center has also been used by the County Sheriff to provide emergency housing for community members when their home was damaged by fire.

[123] The District reported that it used to charge less to residents of the District, but sometimes residents would rent the facility for friends that lived outside of the District. The District thought that closer policing of rentals was not feasible, so the District decided to charge the same fees to everyone.

Figure 9-2: Rollingwood Recreation Center

GOVERNANCE ALTERNATIVES

RWPRPD consists of 109 acres of unincorporated Contra Costa County, located between the cities of San Pablo and Richmond, west of I-80. Historically, as portions of the District have been annexed to the City of San Pablo, they have been detached from RWPRPD. The District reported that the City of San Pablo had previously shown interest in annexing the entire community of Rollingwood, but the proposal was rejected by the community due to concerns over tax increases following annexation to the City. The District reported that it would not be opposed to annexation to the City of San Pablo in the future, as long as Rollingwood residents do not lose the services they have grown accustomed to.[124]

RWPRPD reported that generating community involvement and interest in the activities of the District has been difficult over the last 10-15 years. As an example, the District cited the fact that only three community members showed up to a recent town hall meeting that had been advertised throughout the community. Due to a lack of community interest in serving on the board, the District changed from a five-member board to a three-member board in 1999; however, a three-member board is not allowed under the principal act.

As part of the Request for Information by LAFCO to RWPRPD during the 2003-04 MSR cycle, LAFCO Executive Officer Annamaria Perrella identified dissolution of RWPRPD as a governance alternative, with the County named as the successor agency, to continue providing services to the area through a County Service Area. CSA R-9 is located adjacent to the boundaries of RWPRPD, and would be the logical successor agency; however, the CSA has also suffered from a lack of constituent interest in recent years (it only has one public member on the five-member advisory committee), and has a lack of existing park and recreation capacity. A governance alternative affecting both agencies would be to consolidate RWPRPD with CSA R-9, and then combine the CSA R-9 advisory committee with the El Sobrante Municipal Advisory Council (ESMAC).[125] Such a governance alternative would improve local accountability and operations for both agencies, as MACs are regulated by adopted County policies, with requirements for meetings, training, operating procedures, and annual reports to the Board of Supervisors. MACs are generally well publicized and have sufficient public interest to retain a full council body.

LAFCO reported significant accountability problems with the District during the previous MSR cycle, and few improvements seem to have been made since then.[126] Although RWPRPD is within City of San Pablo's SOI, establishing a subsidiary district would not be possible until at least 70 percent of the land area and registered voters in Rollingwood are annexed to the City.[127]

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[124] Interview with Charlotte Rude, RWPRPD Building Manager and Director, November 10, 2009.

[125] As of March 2010, the County had already been in discussions to combine the CSA R-9 advisory committee with ESMAC.

[126] See LAFCO Executive Officer's Report and Recommendation, dated August 6, 2003.

[127] California Government Code §57105.

AGENCY MSR DETERMINATIONS

GROWTH AND POPULATION PROJECTIONS

1) The estimated residential population within the district is 2,382. Recent growth has been low due to the fact that the community is entirely built-out, and surrounding by the cities of San Pablo and Richmond. Population is expected to increase at a rate similar to the adjacent City of San Pablo, or in other words, population is expected to increase by three percent (to 2,460 residents) by 2025, at an annual rate of approximately 0.2 percent.
2) There are no planned or proposed developments located within the existing boundary of the District.

PRESENT AND PLANNED CAPACITY OF PUBLIC FACILITIES AND ADEQUACY OF PUBLIC SERVICES, INCLUDING INFRASTRUCTURE NEEDS AND DEFICIENCIES

3) The District provides minimally adequate maintenance and operation services to the Rollingwood Recreation Center.
4) The recreation center has a maximum capacity of between 124 and 266 persons, and the District has no plans to expand the recreation center to add capacity. The District does not directly provide recreation services or parkland.
5) The District estimates that yearly attendance at the Rollingwood Recreation Center is approximately 22,300, or roughly 9.7 attendees per District resident per year.
6) The District rents out the community center on Saturdays for private parties and functions. The District charges $125 per hours for parties, with a five-hour minimum rental. Security is also required by the District, for an additional $25 per hour. A refundable $500 deposit is required to secure a reservation. All noise or music from a party must be halted by 11 p.m. at the latest, and the premises must be completely vacated by midnight. The security officer on hand is authorized to enforce these policies, or else the customer risks forfeiting their deposit.
7) Community programs that make use of the Rollingwood Recreation Center include youth Latin dance classes, Narcotics Anonymous, TOPS meetings, adult square dance classes, Boy Scouts, and the neighboring Lutheran Church. Community programs approved by the board are allowed to use the recreation center at low cost or no cost.
8) Infrastructure needs for the district include improving accessibility of the restroom facilities ($15,000) and improving ventilation for the janitor's closet ($5,000). Other needed improvements include fireproofing or replacing the curtains on the stage, resurfacing and painting of stall lines in the parking lot, and purchasing a sound (microphone and speaker) system.
9) The District does not produce a written capital improvement plan for significant infrastructure needs.

FINANCIAL ABILITY OF AGENCIES TO PROVIDE SERVICES

10) The District provides minimal operations and maintenance services to the Rollingwood Recreation Center, given financial and staffing constraints. The District has no full-time employees, and hires a building manager and janitor by contract. Funds are insufficient for the agency to provide full-time staffing or recreation programming. The building manager is also a board member, and routine maintenance at the facility is often performed directly by the board on a volunteer basis.

11) The most significant service challenge identified by the District is providing adequate services given limited finances and staffing. Rental revenues received by the District have decreased dramatically over the last year, due to a decreased number of facility rentals in the sagging economy.

12) Property tax revenue received by the District averaged $30,000 per year from FY 06-07 to FY 08-09, consisting of 59 percent of total district revenues, while facility rental revenue averaged approximately $19,200 per year over the same time span, consisting of approximately 36 percent of revenues. Total revenues decreased by nearly 17 percent from FY 06-07 to FY 08-09, including a 37 percent drop in facility rental revenue.

13) In FY 08-09 the District spent $30,000 to replace the stove hood in the kitchen, which was an extremely significant expenditure for the small district.

14) The District has not raised facility rental fees since 2003. It is recommended that the District review and update all recreation and facility rental fees regularly.

STATUS OF, AND OPPORTUNITIES FOR, SHARED FACILITIES

15) The District has shared facilities in the past with the City of San Pablo, but does currently practice significant facility sharing.

16) No current or future opportunities for facility sharing were identified by the District.

ACCOUNTABILITY FOR COMMUNITY SERVICE NEEDS, INCLUDING GOVERNMENTAL STRUCTURE AND OPERATIONAL EFFICIENCIES

17) Accountability to local voters is constrained by a lack of contested elections. There has only been one contested election in the District since 1979, and generating public interest in the District has proved difficult.

18) The District does not have a full five-member board. The District reported that it changed from a five-member board to a three-member board in 1999 due to the inability to fill two vacant board seats. Public accountability would be improved by having a full five-member governing body, as required by law, with vacancies filled pursuant to Sections 1779-1780 of the Government Code.

19) The District has not audited financial statements in at least 10 years. The District identified having back-audits performed starting FY 09-10 as a goal to improve accountability.

20) The District conducts community outreach through the volunteer efforts of Narcotics Anonymous and the Boy Scouts.

21) The District demonstrated limited accountability in its disclosure of information and cooperation with LAFCO. The agency did not responded to LAFCO's initial written questionnaire in a timely manner, but did ultimately submit the RFI at an in-person interview. The District did not provide follow-up comments or participate in the agency review process. Numerous calls and emails to the District soliciting comments went unanswered.

SOI RECOMMENDATIONS AND DETERMINATIONS

The existing SOI for RWPRPD is not identifiable in the LAFCO records and completion of the 2004 MSR for the District was deferred.

AGENCY PROPOSAL

The agency indicated a desire for a coterminous SOI, because it plans to continue providing services to the communities of Rollingwood and Wilart Park; however, the District indicated it was open to other governmental structure options, including annexation to the City of San Pablo. The entire RWPRPD boundary area is within the existing SOI for the City of San Pablo, but the 2009 West County Sub-Regional MSR reported that the City does not anticipate annexing this area in the near future.[128]

SOI OPTIONS

Given the considerations addressed in the Municipal Service Review, three options are identified for the RWPRPD SOI:

SOI Option #1 – Zero SOI

Adopting a zero SOI would signify that LAFCO anticipates that the district would eventually be dissolved, and its functions provided by another service provider, such as the City of San Pablo or a County Service Area. Adopting a provisional zero SOI would also be appropriate as a short-term measure, until the District can demonstrate accountability to LAFCO by filling the vacant board seats and performing back-audits of financial records.

SOI Option #2 – Coterminous SOI

If LAFCO determines that the existing government structure is appropriate, then a coterminous SOI should be adopted. This option would allow the district to conduct long-term planning for its boundary area.

[128] Contra Costa LAFCO: West County Sub-Regional MSR, Final Draft November 2009, Page VI-23.

RECOMMENDATION

This report recommends that LAFCO adopt a provisional zero SOI, in order to promote incentives for the District to fill the two vacant board member positions and improve accountability. The recommendation is for LAFCO to ask the District to report on its progress after a six-month and 12-month period (from the date of actual SOI update). At the end of the 12-month period, LAFCO would re-visit the SOI for the District, and have the option of determining a successor agency (such as CSA R-9 or the City of San Pablo) and dissolving the District, or adopting a coterminous SOI.

Table 9-3: RWPRPD SOI Analysis

Issue	Comments
SOI update recommendation	Provisional zero SOI, with the District reporting on its progress filling the two vacant board seats after six months and 12 months, and LAFCO re-visiting the SOI after 12 months.
Services provided	RWPRPD operates and maintains the Rollingwood Recreation Center for recreation programs and community events.
Present and planned land uses in the area	The District bounds encompass an entirely urban residential area. There is no significant business activity within the District.
Projected growth in the District/Recommended SOI	The District boundary is entirely built-out. Population is expected to increase at a rate similar to the adjacent City of San Pablo. The estimated population within the District by 2025 is 2,460.
Present and probable need for public facilities and services in the area	There is a present and future need for services at the Rollingwood Recreation Center. The District provides operations and maintenance services to the facility.
Opportunity for infill development rather than SOI expansion	No SOI expansion has been proposed for the District.
Service capacity and adequacy	The District performs minimally adequate services to sufficiently maintain the Rollingwood Recreation Center, due to budget constraints.
Social or economic communities of interest	The communities of interest consist of the Rollingwood and Wilart Park areas.
Effects on other agencies	There are presently no effects on other agencies. Dissolution of the District would have an effect on the successor agency, either the City of San Pablo or a County Service Area managed by Contra Costa County.
Potential for consolidations or other reorganizations when boundaries divide communities	The current boundary of RWPRPD does not divide communities; however, the District indicated that it was open to consolidation with the City of San Pablo. Consolidation with CSA R-9 would also be possible due to the proximity of the two agencies.
Location of facilities, infrastructure and natural features	The Rollingwood Recreation Center is located at 2395 Greenwood Drive, in the unincorporated community of Rollingwood. The facility is located in the southwestern portion of the District boundary.
Willingness to serve	The District has provided operations and maintenance services to the recreation center since 1956, and has indicated a willingness to serve in the future; however, the District has had difficulty generating community

	interest in serving on the board in the last 10 years, and has only had one contested election since 1979.
Potential effects on agricultural and open space lands	No potential effects on agriculture or open space lands were identified.
Potential environmental impacts	Although no potential environmental impacts were identified in the MSR, the LAFCO counsel and planner should make CEQA determinations.

10. COUNTY SERVICE AREAS

There are eight County Service Areas (CSAs) in Contra Costa County that serve as financing mechanisms for enhanced park and recreation services in a specific area. CSAs M-16, M-17, R-7, R-9, and R-10 are administered by Contra Costa County for park and recreation services in unincorporated areas, and CSAs M-29, M-30 and R-4 are administered by the City of San Ramon, the Town of Danville and the Town of Moraga, respectively, for enhanced park and recreation services provided within the city limits. Some CSAs provide financing for additional services beyond parks and recreation, as shown in Table 10-1.

CSA OVERVIEW

Table 10-1: CSA Services

			Park and Rec Services			Other Services				
CSA	**Location**	**Administered by**	**Park Maintenace**	**Recreation**	**Rec/Comm. Center**	**Landscaping**	**Road Maintenance**	**Drainage**	**Street Lights**	**Law Enforcement**
M-16	Clyde	County	□	×		Δ				
M-17	Tara Hills/Montalvin Manor	County	○	○	○					
M-29	City of San Ramon	City of San Ramon	□		□	□	□	□	□	□
M-30	Alamo	Town of Danville	□		□	□	□		○	○
R-4	Town of Moraga	Town of Moraga	□	○	□					
R-7 (Zone A)	Alamo	County	Δ	□	×					
R-9	El Sobrante	County	□	×	×					
R-10	Rodeo and Rodeo Creek Trail	County	○	○	○					

□ *indicates service provided directly by agency*
Δ *indicates service provided by agency staff and by contract with another provider*
○ *indicates service provided by contract with another service provider*
× *indicates formation purpose not presently exercised*

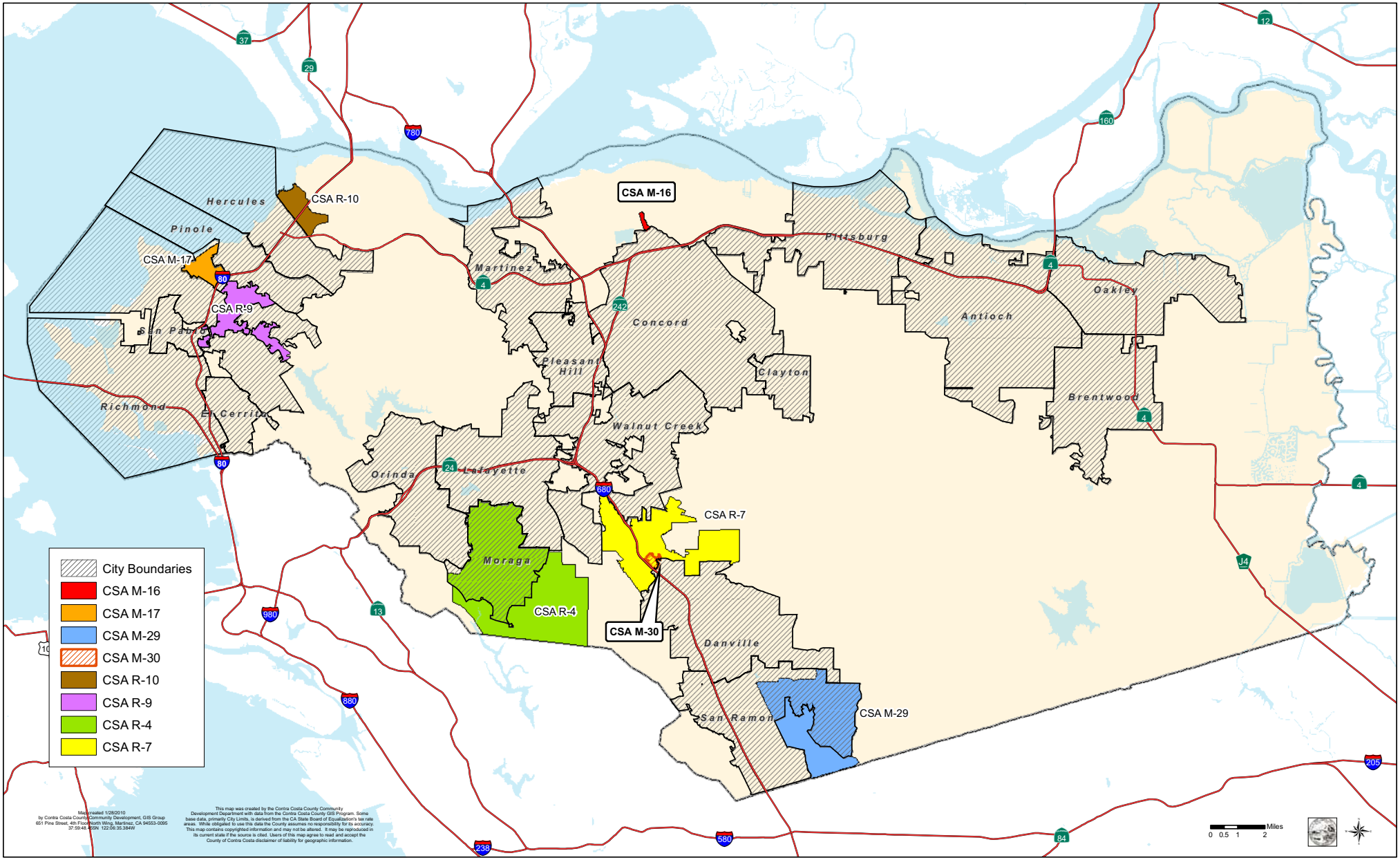
All Contra Costa CSAs are located entirely within Contra Costa County, as shown in Map 10-1. Contra Costa is the principal county and Contra Costa LAFCO has jurisdiction.

The existing SOI for each of these CSAs were affirmed by LAFCO in 2004 to be coterminous with the respective CSA boundary.[129]

[129] Contra Costa LAFCO minutes, February 11, 2004.

Map 10-1

Park and Recreation CSAs - Boundaries and Coterminous SOIs



Map created 1/28/2010
by Contra Costa County Community Development, GIS Group
651 Pine Street, 4th Floor North Wing, Martinez, CA 94553-0095
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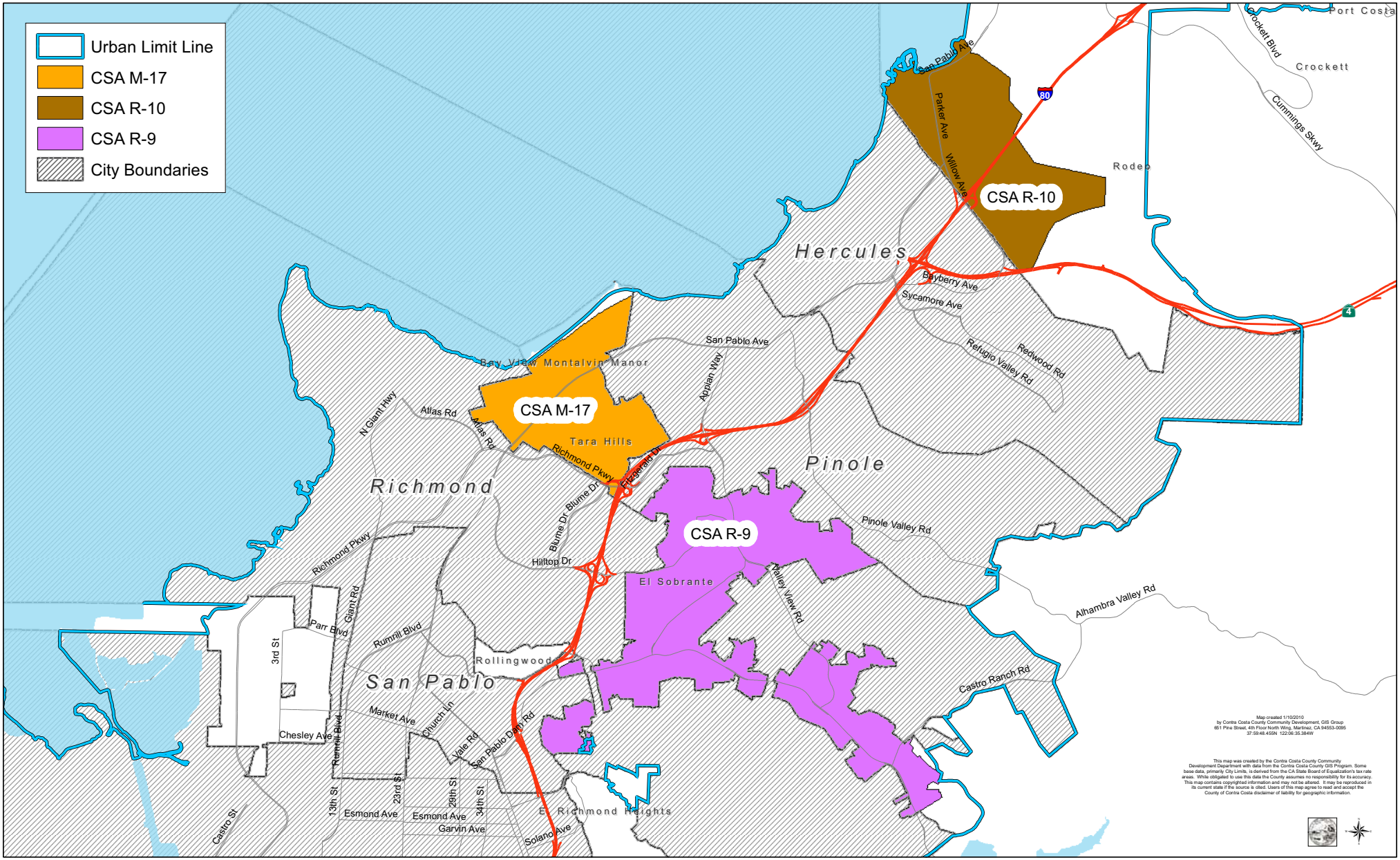
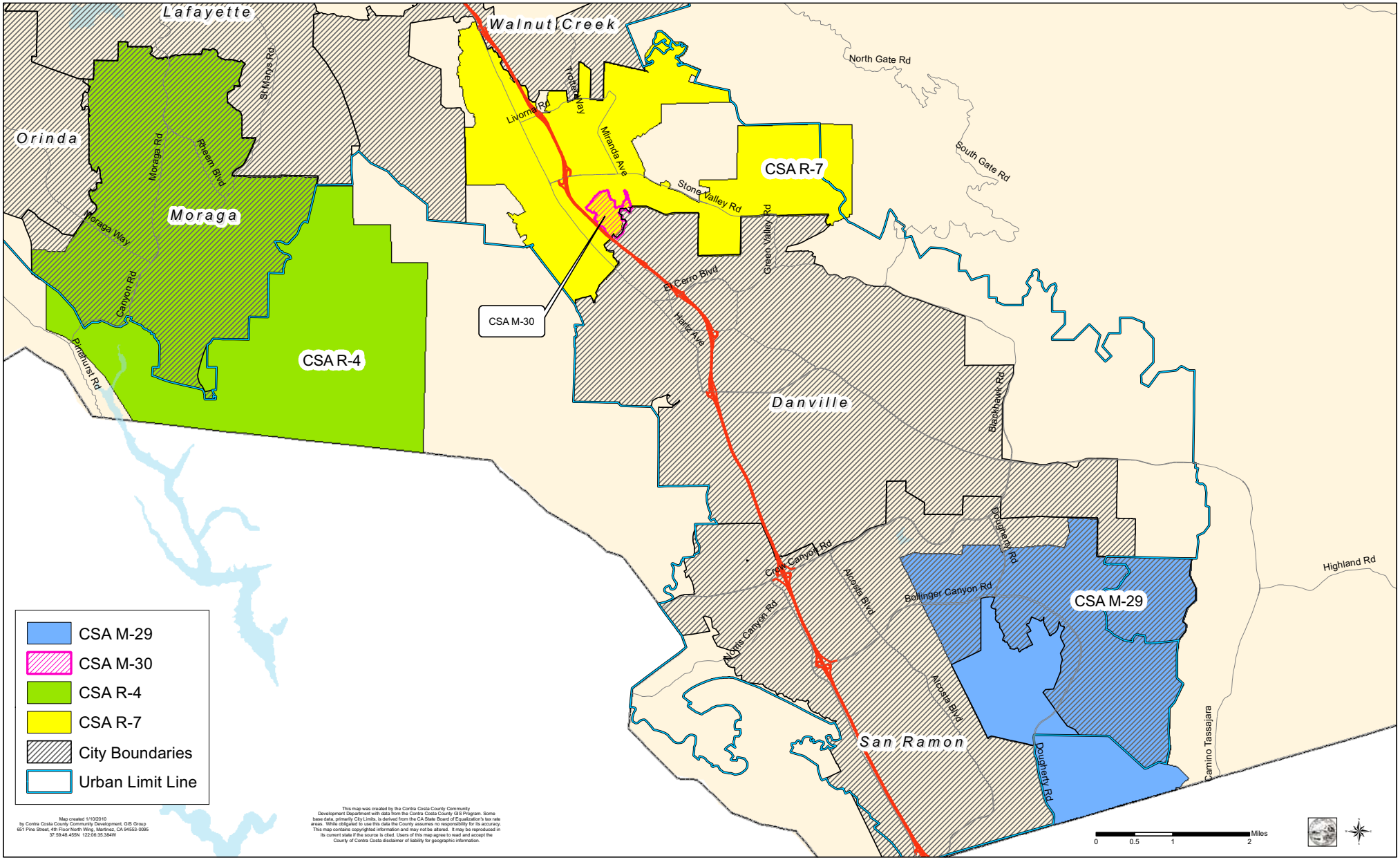
Map 10-2

West County Park and Recreation CSAs - Boundaries and Coterminous SOIs



Map 10-3

Central County Park and Recreation CSAs - Boundaries and Coterminous SOIs



Map created 1/10/2010
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The principal act that governs CSAs is the County Service Area law.[130] The principal act authorizes CSAs to provide a wide variety of municipal services, including parks and recreation, landscaping, street maintenance and lighting, library, and extended police protection.[131] A CSA may only provide those services authorized in its formation resolution unless the Board of Supervisors adopts a resolution authorizing additional services. If LAFCO approved formation of a CSA with a condition requiring LAFCO approval for new services, the Board of Supervisors must first obtain LAFCO approval before authorizing additional services.[132] Districts must apply and obtain LAFCO approval to exercise latent powers or, in other words, those services authorized by the principal act but not provided by the district at the end of 2000.[133]

In accordance with changes in State law (SB 1458), in 2009, LAFCO completed an inventory of all CSAs within the County and the services they provide.

GOVERNANCE

All CSAs are dependent special districts governed by the County Board of Supervisors. Board members are elected by supervisorial districts and serve staggered four-year terms. Board meetings are held weekly. The last contested election for a board seat occurred in 2008 when two seats were contested. Current board members and terms are shown in Table 10-2.

Table 10-2: CSA Governing Body

County Service Areas				
Governing Body				
Board of Supervisors	**Name**	**District**	**Began Serving**	**Term Expires**
	John M. Gioia	District I, Chair	1999	2010
	Gayle B. Uilkema	District II	1997	2012
	Mary N. Piepho	District III	2005	2012
	Susan Bonilla	District IV	2007	2010
	Federal D. Glover	District V	2001	2012
Manner of Selection	Elections by district			
Length of Term	Four years			
Meetings	Date: Tuesdays at 9:30 a.m.	Location: 651 Pine St., Room 107 Martinez, CA 94553		
Agenda Distribution	Online and posted			
Minutes Distribution	Video of meetings available online and minutes by request to County Clerk.			

Park and recreation CSAs serving the unincorporated areas are administered by the County Public Works Department, and park and recreation CSAs financing services in incorporated areas

[130] Government Code §25210.1-25211.3.

[131] Government Code §25210.4 and 25210.4a.

[132] Government Code §25210.31.

[133] Government Code §56824.10.

are administered directly by the City of San Ramon (CSA M-29), the Town of Danville (CSA M-30), and the Town of Moraga (CSA R-4).

FINANCING

The County practices fund accounting, with separate funds established for each legally separate CSA. Detailed financing information for each CSA can be found in the following CSA-specific sections.

CSAs are primarily financed through property taxes and charges for services. In addition, CSAs M-29 and M-30 also receive special benefit assessment revenue. All revenues for CSAs M-29, M-30 and R-4 are transferred to the respective city for use as the city sees fit for approved services.

The CSAs do not impose park-related development impact fees on new development; however, the County has adopted development dedication requirements for park and recreation facilities. Development requirements in place by the County require that new developments dedicate land for park and recreation facilities, or pay an in-lieu fee of $7,238 per single-family home in the unincorporated areas of these CSAs. The Town of Moraga charges a park improvement fee of $3,020 and a land acquisition fee of $8,555 for a total park development fee of $11,575 per single family unit. The Town of Danville charges $8,718 per unit. The City of San Ramon does not charge a park development impact fee for units associated with the Dougherty Valley Specific Plan, however, it requires parkland dedications at a density of 6.5 acres per 1,000 residents.[134] Park impact fees are only collected on development that occurs within the city or town limits.

The County reported that the current financing level for these CSAs is not adequate to deliver services. The County has repeatedly proposed measures to increase assessment and special tax revenues; however, these efforts have been rejected by voters. The County is presently looking for alternate funding sources to fill the funding gap, such as grants. The County is also looking for alternative ways to provide services at a reduced cost, such as working with non-profit organizations to provide recreation services in county-owned facilities.[135] The cities reported that financing, while constrained, is generally sufficient to provide park and recreation services.

There is no adopted policy on CSA financial reserves. None of the CSAs had long-term debt at the end of FY 08-09, and are not authorized to issue bonded debt.

CSAs engage in joint financing arrangements related to staffing, and share facilities for park maintenance, landscaping and administrative purposes. No other facility sharing opportunities were identified.

[134] By contrast, most cities and towns set their park impact fees based on a density of between three and five acres per 1,000 residents.

[135] Interview with Susan Cohen, Contra Costa County Special Districts Coordinator, November 17, 2009.

COUNTY-ADMINISTERED CSAS

LOCAL ACCOUNTABILITY AND GOVERNANCE

The County encourages each CSA to have a committee or advisory panel to keep the County informed of issues, although any CSA resident may contact the County's Special Districts Coordinator for service requests. Advisory committees also provide input to the County on ways to address problems. Staff in the County Public Works Department's Special Districts Section work with the CSA advisory committees on day-to-day operations and planning for future improvements.

Table 10-3: CSA Governing Body

CSA	Advisory Committee Chair
M-16	Cindy Welles
R-7A	David Bowlby
R-9	Donald Bastin
R-10	Josephine Orozco

Advisory committee members are appointed by the Board of Supervisors for two-year terms. Each committee is comprised of between five and seven residents within the respective CSA. Of the county-administered CSAs, CSA M-17 is the only CSA without an advisory committee. The M-17 committee was disbanded by the Board of Supervisors in 1990, due to a high degree of tension and acrimony at meetings.[136] Although the advisory committee for CSA R-7 Zone A was dissolved in December 2009, the responsibilities of the committee were assumed by the newly formed Alamo Municipal Advisory Council (MAC)—a combination of the advisory committees for CSAs R-7 Zone A and LL-2 Zone 36. As of November 2009, there were four vacant positions on the CSA R-9 advisory committee. Refer to Table 10-3 for a list of the CSAs with advisory committees and the chair for each committee.

Complaints may be submitted through phone calls, email, letters and in person to the County Public Works Department or the CSA's advisory committee. Complaints most often relate to graffiti, grass quality and weeds, and lighting issues. The County Public Works Department reviews complaints, and uses a customer service tracking system to log and respond to service requests from customers. Any problems or concerns raised by the advisory committees are addressed as staffing and financing allows.

When property owners or advisory committees request maintenance services, County staff reviews the requests for necessity and the availability of funds to finance the requests. Staff recommends which projects should be performed. Significant maintenance issues or capital projects requested by the advisory committees must first be directed to the Board of Supervisors for approval. The County hires contractors to perform services through a competitive bidding process, or performs the work directly and bills the CSA. County staff inspects the work performed prior to making payment to a contractor for services.

All county-administered CSAs demonstrated full accountability in the disclosure of information and cooperation with LAFCO. The agencies responded to LAFCO's written questionnaires and cooperated with LAFCO document and interview requests.

[136] However, the Montalvin Manor Redevelopment Advisory Council (RAC) provides informal feedback to Public Works Special Districts staff about M-17 issues. The RAC is composed of community members and one business seat from both District I and District II, and meets monthly.

MANAGEMENT

CSAs M-16, M-17, R-7, R-9, and R-10 are staffed and managed by the County Public Works Department Special Districts Unit. There is one full-time special districts coordinator and three part-time administrative staff that serve all county CSAs. All unit staff report to the Special Districts Coordinator, who reports to the Assistant Public Works Director in charge of the Engineering Services Division. For each of the CSAs, the administrative staff formulates and monitors budgets, and coordinates and oversees infrastructure improvements and installation specific to each district. The County estimated that approximately one full-time equivalent from the Special Districts Unit is dedicated to these five CSAs. In addition, the General Services Department provides staff for maintenance of the CSA M-16, R-7 and R-9 park facilities. The County estimated that there is 1.3 full-time equivalents dedicated to the maintenance of R-7 facilities, while the maintenance of M-16 and R-9 facilities is completed by request.

The Deputy Director of Public Works evaluates the performance of existing employees on an annual basis and probationary employees every six months. Workload monitoring is achieved through staff meetings, time sheets, department-wide work logs, and direct oversight.

With regard to unit and CSA operation, the County evaluates performance through the budget process including performance and fiscal measures. In addition, the Special Districts Unit relies on constituent feedback through the customer service tracking system, advisory committees and elected officials to determine need for improvement or project success. The County does not conduct benchmarking related to CSAs, but identified that it plans to join a special districts association for that purpose. The County annually prepares audited financial statements; however, CSA information is not identifiable in these statements.

County planning efforts, with regard to the CSAs, include a parks capital improvement plan (CIP), completed in 2007, and annual budget projections. Updates to the CIP are made as needed with input from the communities. The CIP was a countywide planning effort conducted by the Parks, Trails and Master Plan Committee with input from the Special Districts Unit. Generally, CSA planning efforts are limited to the services provided within their boundaries; however, the Public Works Department is involved in regional planning, and considers possible impacts to the CSAs.

In terms of management accomplishments, the Contra Costa Public Works Department was awarded accreditation by the American Public Works Association in 2001, and was re-accredited in 2004 and 2008. In addition, the Department has received several commendations for watershed projects and outstanding service between 2004 and 2009.

CSA M-16

CSA M-16 provides landscaping and park maintenance services in the unincorporated community of Clyde.

FORMATION AND BOUNDARY

CSA M-16 was formed on June 16, 1964 as a dependent special district of the County.[137] At formation the CSA was called CSA L-44, but in 1971 the name was changed to CSA M-16. The boundary area of the CSA is approximately 0.14 square miles, or approximately 90 acres. The SOI for CSA M-16 is coterminous with the boundary of the CSA.

Boundary History

Since formation, there has been one boundary change. The 1972 Port Chicago Detachment removed 210 acres from the northern portion of the CSA.[138]

In 1986, the Lighting District Reorganization transferred street lighting services from the CSA to CSA L-100—the boundary of CSA M-16 remained unchanged.[139]

SERVICE DEMAND AND GROWTH

The CSA bounds encompass the unincorporated community of Clyde (north of Concord and west of Bay Point). The CSA is entirely within the City of Concord's SOI. The CSA boundary is primarily residential; however, there is light industrial activity located on six parcels in the southwestern portion of the CSA, south of Medburn Street.

The CSA considers its customer base to be the approximately 290 homeowners within the CSA. The estimated population within the CSA is 781.[140] The CSA's population density is 5,576 per square mile, compared with the 2009 countywide density of 1,473. The area has not experienced significant recent growth because the CSA is entirely built-out, and does not anticipate significant changes in service demand in the future. The estimated population of the CSA by 2025 is 806.[141]

The CSA is a dependent special district of the County, and is not a land use authority. The County is the land use authority, and holds primary responsibility for implementing growth strategies.

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[137] Board of Equalization official date.

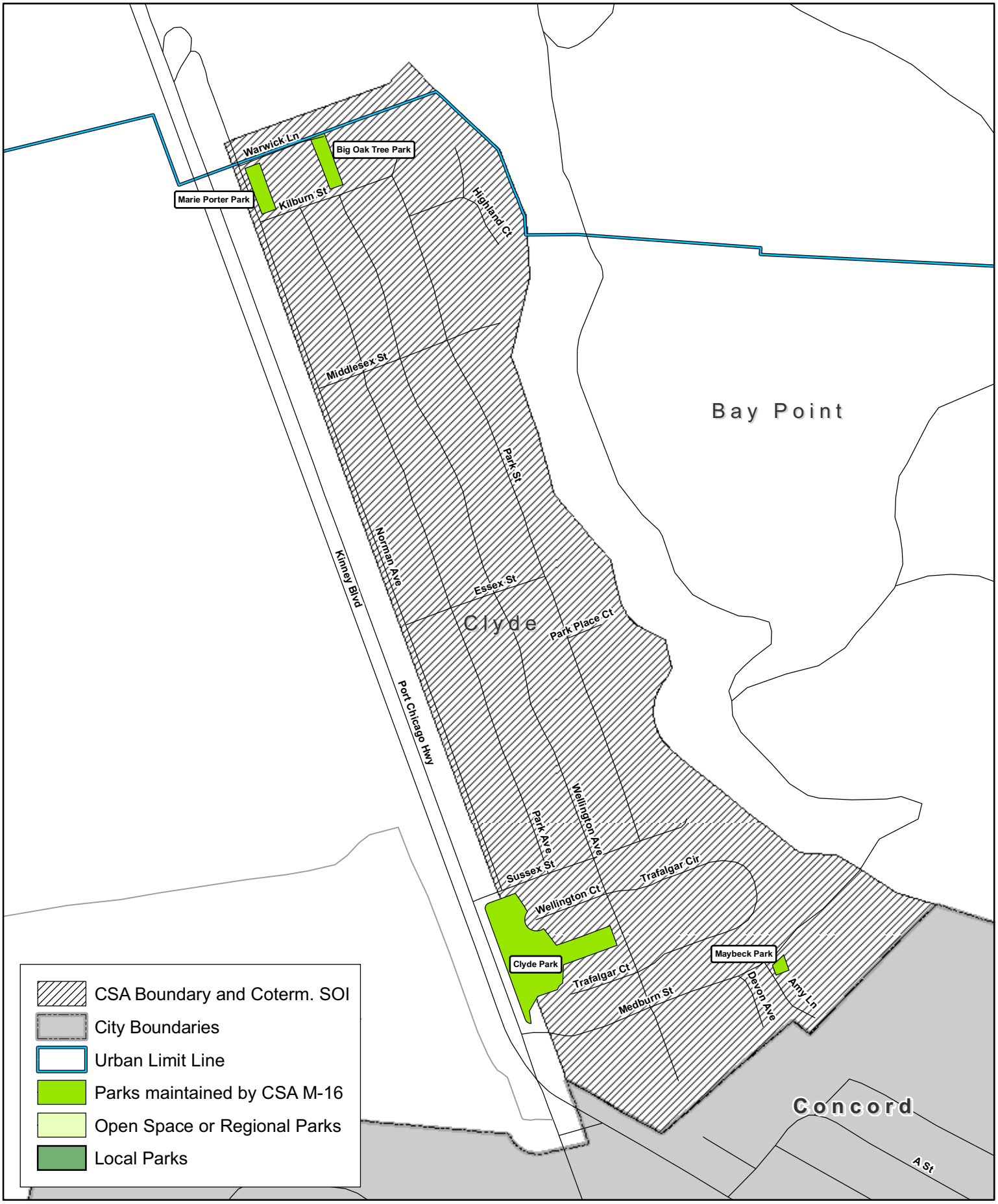
[138] Approved by LAFCO on 6/5/1972 and recorded on 8/30/1972.

[139] Board of Equalization official date: 4/16/87.

[140] Based on the average household population of 2.7 for unincorporated Contra Costa County in 2009, according to the Department of Finance.

[141] Association of Bay Area Governments, Population Projections, 2009.

Map 10-4 CSA M-16 and Coterminous Sphere of Influence



Map created 3/24/2010
by Contra Costa County Community Development, GIS Group
651 Pine Street, 4th Floor North Wing, Martinez, CA 94553-0095
37:59:48.455N 122:06:35.384W

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Feet
0 250 500 1,000

FINANCING

Table 10-4: CSA M-16 Financial Information, FY 08-09

CSA M-16, FY 08-09			
General Financing Approach			
In FY 08-09, parks and recreation services in the CSA were financed primarily by Proposition 12 grant funds (52%), park dedication funds assessed by the County (33%), property taxes (9%), and restricted donations (9%). Total expenditures consisted primarily of construction of the Big Oak Tree Park (37%), facility maintenance (37%) and administration (3%).			
Revenues		**Expenditures**	
Total Available Funding	$292,417	Total Operating Expenditures	$292,417
Beginning Fund Balance	$14,704	Project Management	$169,705
Total Operating Revenues	$277,713	Facility Maintenance	$9,576
Property Tax	$25,901	Recreation & Senior Services	$0
Park & Recreation Fees[1]	$0	Capital Outlays[2]	$113,136
Other General Fund[3]	$92,895	Other[4]	$0
Restricted Donations	$15,700		
Intergovernmental/Grants[5]	$143,217		

Notes:

(1) Park and recreation fees include fees for recreation services, facility rentals and concessions.

(2) The County reported that capital outlays includes a portion of construction costs for the Big Oak Tree Park.

(3) Other general fund sources include sources other than those listed separately (i.e., park and recreation fees, property tax).

(4) Other includes trust fund, contract management, and other operating costs.

(5) Includes funds from the Proposition 12 Safe Neighborhood Parks, Clean Water, Clean Air and Coastal Protection Bond Act of 2000.

PARK AND RECREATION SERVICES

Nature and Extent

CSA M-16 provides park maintenance services, which are provided directly by the County General Services Department.

Location

CSA services are provided to the unincorporated community of Clyde. The CSA is staffed and served by County Public Works staff, who are responsible for providing services throughout the unincorporated areas of the County.

Non-residents may use the CSA's facilities, but must pay a non-resident fee for facility rentals.

Parks and Recreation Facilities

Park and recreation facilities serving the CSA include four parks located within the CSA's bounds. All four of the parks are owned by the County.

Big Oak Tree Park was completed in 2009 and is in excellent condition. No additional needs or deficiencies were identified for Big Oak Tree Park. Clyde Park and Marie Porter Park were built in 1991 and were identified by the County as being in fair condition. Planned upgrades for Clyde Park outlined in the CIP include upgraded irrigation and drainage, installation of restrooms, additional BBQ areas, and improved access. These improvements are estimated to cost $1.3 million. Planned upgrades for Marie Porter Park are new restrooms, new basketball court flooring, new fencing, and a drinking fountain estimated to cost $0.5 million. The Maybeck Park was completed in 2005 and consists of a single picnic table. It was also identified as being in fair condition. Needs for Maybeck Park identified by the County include restrooms and a bike rack totaling approximately $0.5 million. The County planned to complete improvements for these three parks in 2008, but has not yet acquired sufficient funding.

The CSA is planning to construct a hiking trail. Plans are presently in the design phase and there is no timeline or cost estimate presently.[142]

CSA M-16 appears to have sufficient park capacity to serve the residents within its boundaries presently and into the future, as the community is entirely built-out. As of 2009, there are approximately three acres of parkland per 1,000 residents provided by the CSA, which meets the recommended California benchmark of three to five acres per 1,000 residents,[143] and the County General Plan goal of 2.5 acres of neighborhood park facilities per 1,000 population.[144]

There are no school parks or parks operated by other providers within the CSA or in the 0.5 mile vicinity of the CSA.

The CSA does not share park facilities with other organizations. The County did not identify any further opportunities for park or recreation facility sharing within CSA M-16.

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[142] Interview with Susan Cohen, Contra Costa County Special Districts Coordinator, November 17, 2009.

[143] For developer park dedication requirements (i.e., "Quimby" fees), California statute (Government Code §66477(a)(2)) sets a benchmark of three to five acres per 1,000 residents

[144] Contra Costa County, *General Plan 2005-2020*, 2005, p. 9-22.

Table 10-5: CSA M-16 Park and Recreation Services

CSA M-16 Park and Recreation Service Adequacy and Facilities						
Service Configuration						
Park Maintenance	Direct	Recreation Programming			None	
Service Adequacy[1]						
Total Park Acres	2.4	Total Park Acres per 1,000[2]			3.0	
Active Parkland	0.0	Active Parkland per 1,000			0.0	
Passive Parkland	2.4	Passive Parkland per 1,000			3.0	
Park Maintenance Cost per Acre	$4,041					
Recreation Facilities and Parks						
Name	**Location**	**Property Owner**	**Park Type**	**Facilities**	**Condition**	**Acres**
Big Oak Tree Park	Middlesex St., Clyde	County	Passive	Park benches, BBQ area, sitting walls	Excellent	0.1
Clyde Park	Sussex St. & Wellington Ave.	County	Passive	Grassed play area, tennis court, picnic and BBQ area, playground	Fair	2.0
Marie Porter Park	Normand Ave. & Kilburn St.	County	Passive	Basektball court	Fair	0.2
Maybeck Park	Medburn St. & Amy Ln.	County	Passive	Picnic table	Fair	0.1

Notes:
(1) Active parkland consists of developed parkland with active recreation programming and sports facilities, such as active ball courts (e.g., basketball or tennis), delineated sports fields (e.g., soccer, baseball, softball), aquatic facilities, gymnasiums, etc. Passive parkland consists of developed or undeveloped parkland containing trails, walkways, cultural or scenic resources, open fields, picnic tables/shelter, tot lots, etc., but not containing facilities used for active recreation programming.
(2) Acres per 1,000 population based on average household size.

CSA M-16 GOVERNANCE ALTERNATIVES

No governance alternatives were identified for CSA M-16.

CSA M-16 MSR DETERMINATIONS

Growth and population projections

1) The 2009 residential population within the district was 781. Recent growth has been low as the area is built-out. The projected population within the CSA by 2025 is 806.
2) Future growth will be limited to infill as the area is built-out.

Present and planned capacity of public facilities and adequacy of public services, including infrastructure needs and deficiencies

3) CSA M-16 appears to have sufficient park capacity to serve the residents within its boundaries presently and into the future, as the community is entirely built-out. As of 2009, there are approximately three acres of parkland per 1,000 residents provided by the CSA, which meets the recommended California benchmark standard and the County's general plan parkland goal for neighborhood parks.

4) There are no school parks or parks operated by other providers within the CSA or in the 0.5 mile vicinity of the CSA.

5) The most significant service challenge for the CSA is unfunded deferred maintenance and improvements at the existing park facilities totaling an estimated $2.3 million.

6) Three of the CSA's four parks are in fair condition and have several infrastructure needs or deficiencies, including upgraded irrigation and drainage, installation of restrooms, additional BBQ areas, improved access, new basketball court flooring, new fencing, a drinking fountain, and a bike rack.

7) The District has an up-to-date capital improvement plan; however, it appears to operate as a complete list of needs rather than a plan of when capital funding will become available for necessary improvements.

Financial ability of agencies to provide services

8) The District reports that the current level of financing is not sufficient for adequate service provision. There are significant capital needs which have not been addressed because the current financing level is not adequate to provide services.

Status of, and opportunities for, shared facilities

9) The Agency does not practice significant facility sharing.

10) No opportunities for future facility sharing were identified.

Accountability for community service needs, including governmental structure and operational efficiencies

11) Accountability to local voters is achieved through the CSA advisory committee. The advisory committee acts as a sounding board for the community to voice local preferences to the County Board of Supervisors.

12) The CSA demonstrated accountability and transparency by disclosing financial and service related information in response to LAFCO requests.

CSA M-16 SOI RECOMMENDATIONS AND DETERMINATIONS

The existing SOI for CSA M-16 is coterminous with its bounds. The SOI for the district was affirmed by LAFCO in 2004.

Agency Proposal

The County did not propose any changes to the CSA's existing SOI.

SOI Options

Given the considerations addressed in the MSR, one option is identified for the CSA M-16 SOI:

SOI Option #1 – Retain existing coterminous SOI

If LAFCO determines that the existing government structure is appropriate, then the existing SOI should be retained. This option would enable the district to continue to include the areas within its SOI in its long-term planning.

Recommendation

The recommended SOI for CSA M-16 is to retain its existing coterminous SOI. The CSA has a steady revenue source and continues to provide park services at sufficient levels. The area is entirely built-out and no change in demand for park services is anticipated within the CSA and adjacent to the CSA, consequently no changes to the existing SOI are necessary or recommended.

Table 10-6: CSA M-16 SOI Analysis

Issue	Comments
SOI update recommendation	Retain existing coterminous SOI.
Services provided	CSA M-16 provides park maintenance services, which are provided directly by the County General Services Department.
Present and planned land uses in the area	The CSA boundary is primarily residential; however, there is light industrial activity located on six parcels in the southwestern portion of the CSA, south of Medburn Street.
Projected growth in the District/Recommended SOI	The CSA is entirely built-out, consequently, only limited infill growth is anticipated in the future.
Present and probable need for public facilities and services in the area	There is a present and probable need for park services. As the area is a built-out community consisting primarily of residences, the demand of park services is anticipated to remain constant in the future.
Opportunity for infill development rather than SOI expansion	An SOI expansion is not recommended at this time.
Service capacity and adequacy	CSA M-16 appears to have sufficient park capacity to serve the residents within its boundaries presently and into the future, as the community is entirely built-out. As of 2009, there are approximately three acres of parkland per 1,000 residents provided by the CSA, which meets the recommended California benchmark standard and the County's general plan parkland goal for neighborhood parks.
Social or economic communities of interest	Communities of interest within the CSA include the residents of the unincorporated community of Clyde and the landowners that pay a portion of their property tax to the District.
Effects on other agencies	Retention of the existing SOI is not anticipated to have impacts on other service providers.
Potential for consolidations or other reorganizations when boundaries divide communities	Presently, consolidation is not necessary or feasible, as the CSA's boundaries do not divide a community and there is a lack of districts to consolidate with the CSA.

Location of facilities, infrastructure and natural features	All four of the CSA's parks are located within the District's boundaries and are evenly spread out—with a park in the northwest, southeast and southwest corners of the District, and a park in the center of the District.
Willingness to serve	The CSA presently serves the area and is willing to continue to serve all areas within its boundaries.
Potential effects on agricultural and open space lands	The SOI recommendation for the District is not anticipated to directly impact agricultural and open space lands.
Potential environmental impacts	Although no potential environmental impacts were identified in the MSR, the LAFCO counsel and planner should make CEQA determinations.

CSA M-17

CSA M-17 provides park and recreation facility maintenance and recreation programming for the unincorporated communities of Tara Hills and Montalvin Manor.

FORMATION AND BOUNDARY

CSA M-17 was formed on January 26, 1965 as a dependent special district of the County.[145] The CSA was originally formed as CSA R-1, but was renamed CSA M-17 in 1972. The boundary area of the CSA is approximately 1.3 square miles, or approximately 832 acres. The SOI for CSA M-17 is coterminous with the boundary of the CSA.

Boundary History

Since formation, there have been six boundary changes to the CSA according to LAFCO records. In 1971, the CSA annexed County Sanitation District Number 3. All of the subsequent boundary changes were reorganizations that annexed territory to the City of Pinole and resulted in a detachment from the CSA. The Board of Equalization (BOE) records do not show the Yancy and Rogers-Konica-Bradshaw reorganizations.

Table 10-7: CSA M-17 Boundary History

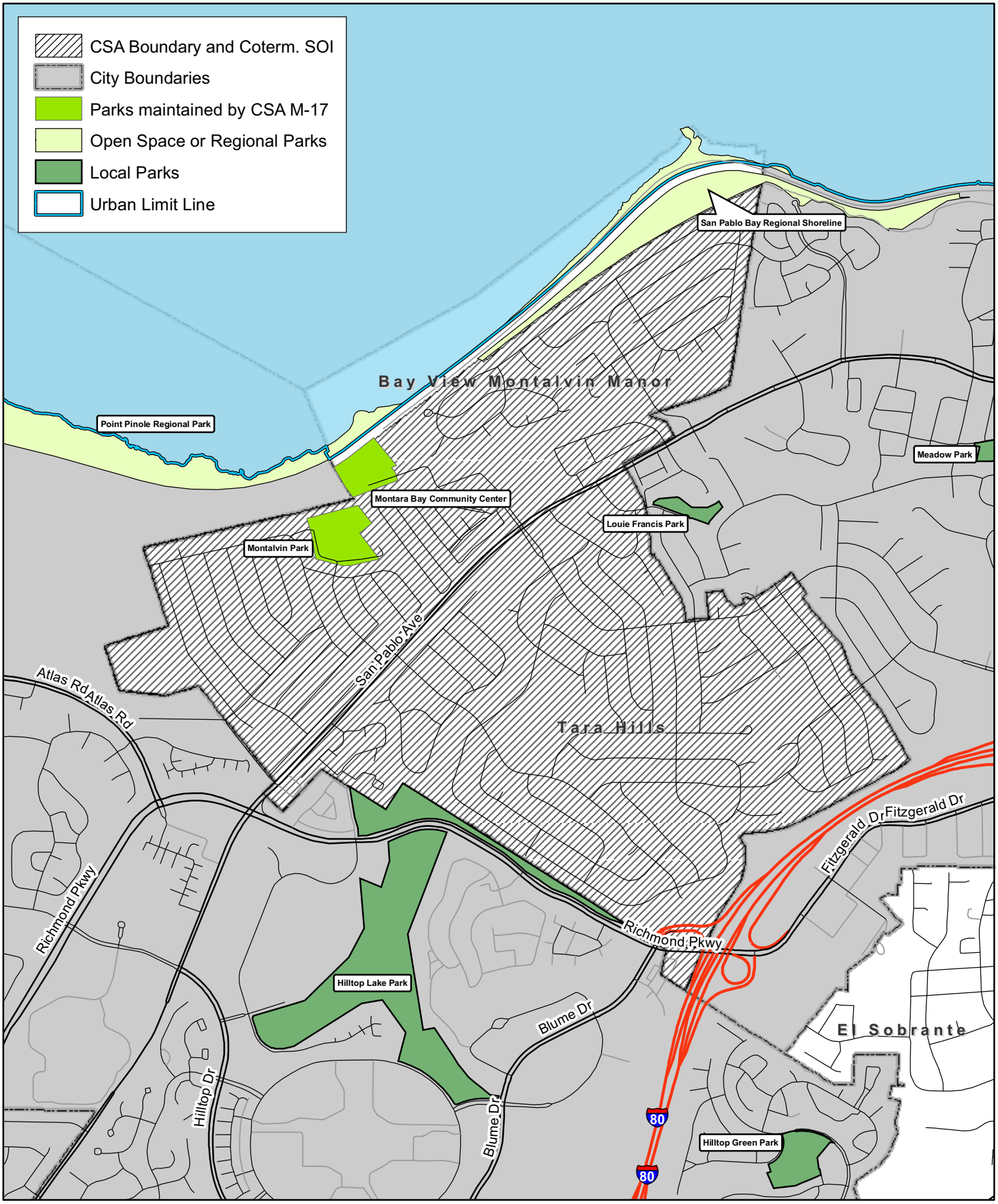
Project Name	LAFCO Reso./Date	Change Type	Acres[1]	Recording Agency[2]
Formation	1/26/1965	Formation	NA	BOE
County Sanitation District No. 3	12/14/1971	Annexation	NA	BOE
Yancy Reorganization	11/14/1979	Detachment	1.4	LAFCO
Rogers-Konica-Bradshaw Reorganization	1/9/1980	Detachment	20.0	LAFCO
Garrity Ridge/Willow Brook Reorganization	88-4	Detachment	34.3	Both
Mosby/Donelly Reorganization	89-37	Detachment	0.7	Both
Gozzano Reorganization	89-11	Detachment	0.8	Both

Notes:
(1) NA indicates that acreage is not available in the LAFCO records.
(2) Recording agency indicates whether Contra Costa LAFCO or the Board of Equalitzation (BOE) maintains records of the particular boundary change.

[145] Board of Equalization official date.

Map 10-5

CSA M-17 and Coterminous Sphere of Influence



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Feet
0 250 500 1,000

SERVICE DEMAND AND GROWTH

The District bounds encompass the unincorporated communities of Montalvin Manor and Tara Hills (immediately northeast of the City of Richmond and southwest of the City of Pinole). The CSA is entirely within the City of Pinole SOI. The CSA area is primarily residential with two schools, limited commercial properties along San Pablo Avenue, and the Richmond Parkway Transit Center next to Interstate 80.

The District considers its customer base to be the approximately 2,794 homeowners within the CSA. The estimated population with the CSA is 7,521.[146] The CSA's population density is 5,786 per square mile, compared with the 2009 countywide density of 1,473. The area has not experienced significant recent growth, and does not anticipate changes in service demand in the future. The projected population within the CSA by 2025 is 7,766. There are no planned or proposed developments within the CSA.

The CSA is a dependent special district of the County, and is not a land use authority. The County is the land use authority, and holds primary responsibility for implementing growth strategies.

FINANCING

Table 10-8: CSA M-17 Financial Information, FY 08-09

CSA M-17, FY 08-09			
General Financing Approach			
In FY 08-09, parks and recreation services in the CSA were financed primarily by property taxes (52%) and redevelopment funds (39%). Total expenditures consisted primarily of capital outlays (43%), payments to contracting service providers for maintenance (26%) and recreation services (15%), and administration (16%).			
Revenues		**Expenditures**	
Total Available Funding	$371,987	Total Operating Expenditures	$371,987
Beginning Fund Balance	$60,222	Administration	$57,714
Total Operating Revenues	$311,765	Facility Maintenance	$97,750
Property Tax	$160,994	Recreation & Senior Services	$55,644
Park & Recreation Fees[1]	$22,746	Capital Outlays	$160,879
Other General Fund[2]	$6,892		
Redevelopment Funds	$121,133		
Notes: (1) Park and recreation fees include fees for recreation services, facility rentals and concessions. (2) Other general fund sources include sources other than those listed separately (i.e., park and recreation fees, property tax).			

[146] Based on the average household population of 2.7 for unincorporated Contra Costa County in 2009, according to the Department of Finance.

PARK AND RECREATION SERVICES

Nature and Extent

CSA M-17 provides park and recreation facility maintenance and recreation programming. All services are provided by private contractors, including park landscaping and maintenance, community center coordination and janitorial services. YMCA of the East Bay provides recreation programming at the CSA facilities and receives the fees for participation. Recreation activities include cheerleading, tee ball, football, softball, drumming, scrapbooking, dancing, art, archery, and others.

Location

CSA services are provided to the unincorporated communities of Montalvin Manor and Tara Hills. The CSA is staffed and served by County Public Works staff, who are responsible for providing services throughout the unincorporated areas of the County.

Non-residents may use the CSA's facilities, but must pay a non-resident fee for recreation programming and facility rentals.

Parks and Recreation Facilities

Parks and recreation facilities serving the CSA include a park, a community center and a ball field complex located in the western portion of the CSA's bounds.

All of the facilities were constructed in 1991 and were identified by the County as being in fair condition. According to the County's Capital Improvement Plan, planned improvements to Montalvin Park total $1 million to improve drainage and irrigation for the soccer field, construct new pathways, restrooms, and basketball and tennis courts, install garbage cans, a water fountain, picnic tables, BBQs and benches, and improve landscaping. The County estimates that funding will be available for these plans in 2010. Plans for the MonTaraBay Park Community Center and Softball complex total $3.4 million and include new flooring, improved road access, restrooms, new turf, landscaping, and new pathways. The County estimates that funding will be available for these improvements in 2011.

There are no plans for additional park and recreation facilities within the CSA at this time.

CSA facilities do not have sufficient capacity to meet existing and future demand, according to California and County adopted park-acreage standards and goals. As of 2009, there is approximately 1.5 acres of parkland per 1,000 residents provided by the CSA, which fails to meet the California benchmark of three to five acres per 1,000 residents[147] and the County General Plan goal of 2.5 acres of neighborhood park facilities per 1,000 population.[148] In order to meet the General Plan goal, the CSA would need an additional 7.8 acres of parkland.

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[147] For developer park dedication requirements (i.e., "Quimby" fees), California statute (Government Code §66477(a)(2)) sets a benchmark of three to five acres per 1,000 residents

[148] Contra Costa County, *General Plan 2005-2020*, 2005, p. 9-22.

While there are two school parks owned by the West Contra Costa Unified School District within the CSA's bounds, the CSA does not have a joint-use agreement with the school district and public use of the facilities after school hours is prohibited. Parks that are within 0.5 miles of the CSA's boundaries include three city-owned facilities. The Pinole Shores Park, owned by East Bay RPD, is located in an unincorporated portion of the County, immediately adjacent to the District in the north, and consists of a hiking trail. In the City of Pinole, adjacent to the District in the east, is the two-acre Louis Francis Park. To the southwest of the District is the Hilltop Lake Park in the City of Richmond which is 36 acres. If the neighborhood park in the City of Pinole is included in the park acreage calculation, then there are approximately 1.7 acres of local parkland serving the CSA. If community and regional parks owned by EBRPD and the City of Richmond are included, then there are approximately 6.5 acres of park facilities per 1,000 within the CSA.

The CSA practices facility sharing by contracting with the YMCA for recreation services in the community center. Opening school parks to the public through an agreement with the West Contra Costa Unified School District is an opportunity for future facility sharing that could enhance the CSA's service level.

Table 10-9: CSA M-17 Park and Recreation Services

CSA M-17 Park and Recreation Service Adequacy and Facilities						
Service Configuration						
Park Maintenance	By Contract	Recreation Programming			By Contract	
Service Adequacy[1]						
Maintained Park Acres	11.0	Total Park Acres per 1,000[3]			1.5	
Active Parkland	4.0	Active Parkland per 1,000			0.5	
Passive Parkland	7.0	Passive Parkland per 1,000			0.9	
Recreation Attendance[2]	6,650	Recreation Attendance per Resident[4]			0.9	
Recreation Cost per Resident	$7.40	Park Maintenance Cost per Acre			$8,886	
Recreation Facilities and Parks						
Name	**Location**	**Property Owner**	**Park Type**	**Facilities**	**Condition**	**Acres**
Montalvin Park	Denise Dr., Pinole	County	Passive	Playground structure, basketball court, tennis court, picnic BBQ area, grassy play area	Fair	7.0
MonTaraBay Park Community Center and Ball Field Complex	2250 Tara Hills Dr., San Pablo	County	Active	Community center, lighted ball field	Fair	4.0

Notes:
(1) Active parkland consists of developed parkland with active recreation programming and sports facilities, such as active ball courts (e.g., basketball or tennis), delineated sports fields (e.g., soccer, baseball, softball), aquatic facilities, gymnasiums, etc. Passive parkland consists of developed or undeveloped parkland containing trails, walkways, cultural or scenic resources, open fields, picnic tables/shelter, tot lots, etc., but not containing facilities used for active recreation programming.
(2) The YMCA tracks class registration and attendance. The County estimated that between 200 and 500 individuals were served through the CSAs recreation programming. In addition, a head count is conducted at each facility rental event by the facility coordinator—approximately 6,300 individuals are served annually through facility rentals.
(3) Acres per 1,000 population based on average household size.
(4) If facility rental recreation attendance were not included, recreation attendance per resident would be approximately 0.05.

CSA M-17 GOVERNANCE ALTERNATIVES

No governance alternatives were identified for CSA M-17.

CSA M-17 MSR DETERMINATIONS

Growth and population projections

1) The 2009 residential population within the district was approximately 7,521. Recent growth has been low. The projected population within the CSA by 2025 is 7,766.
2) There are no planned or proposed developments within the existing boundary and SOI of the District, as the area is built-out. All future development will be limited to in-fill.

Present and planned capacity of public facilities and adequacy of public services, including infrastructure needs and deficiencies

3) CSA facilities do not have sufficient capacity to meet existing and future demand, according to California and County adopted park-acreage standards and goals. As of 2009, there is approximately 1.5 acres of parkland per 1,000 residents provided by the CSA, which fails to meet the California benchmark standard and the County General Plan neighborhood parkland goal.

4) In order to meet the General Plan goal of 2.5 acres of neighborhood parkland per 1,000 residents, the CSA would need an additional 7.8 acres of parkland. If parks operated by neighboring agencies and within 0.5 miles of the CSA are included in the capacity analysis, the General Plan parkland service goal would be exceeded within the CSA.

5) Three additional park facilities, other than those provided by the CSA, are within 0.5 miles of the CSA in the neighboring cities of Richmond and Pinole and unincorporated Contra Costa County.

6) Existing recreational programming is offered through the YMCA and appears to be adequate with a wide variety of programs. In order to advertise the classes available to the public, the CSA should consider a website for the recreation facility and programs offered.

7) The most significant service challenge for the CSA is unfunded deferred maintenance and improvements at the existing park facilities totaling an estimated $4.4 million.

8) Infrastructure needs and planned improvements for the two CSA facilities include improvements to drainage and irrigation for the soccer field, construction of new pathways, new restrooms, and basketball and tennis courts, installation garbage cans, a water fountain, picnic tables, BBQs and benches, improvement of landscaping, new flooring at the community center, and improvements to road access.

9) The District has an up-to-date capital improvement plan; however, it appears to operate as a complete list of needs rather than a plan of when capital funding will become available for necessary improvements.

Financial ability of agencies to provide services

10) The District reports that the current level of financing is not sufficient for adequate service provision. There are significant capital needs which have not been addressed because the current financing level is not adequate to provide services.

Status of, and opportunities for, shared facilities

11) The CSA practices facility sharing by offering recreation programming through a contract with the YMCA at the CSA's community center.

12) Opening school parks to the public through an agreement with the West Contra Costa Unified School District is an opportunity for future facility sharing that could enhance the CSA's service level.

Accountability for community service needs, including governmental structure and operational efficiencies

13) Accountability to local voters is limited as the CSA advisory committee was disbanded in 1990. It is recommended that the County consider reforming the advisory committee, so that it may act as a sounding board for the community to voice local preferences to the County.

14) The CSA demonstrated accountability and transparency by disclosing financial and service related information in response to LAFCO requests.

CSA M-17 SOI RECOMMENDATIONS AND DETERMINATIONS

The existing SOI for CSA M-17 is coterminous with its bounds. The SOI for the district was affirmed by LAFCO in 2004.

Agency Proposal

The County did not propose any changes to the CSA's existing SOI.

SOI Options

Given the considerations addressed in the MSR, one option is identified for the CSA M-17 SOI:

SOI Option #1 – Retain existing coterminous SOI

If LAFCO determines that the existing government structure is appropriate, then the existing SOI should be retained. This option would enable the district to continue to include the areas within its SOI in its long-term planning.

Recommendation

The recommended SOI for CSA M-17 is to retain its existing coterminous SOI. The CSA has a steady revenue source and continues to provide park and recreation services; although, capacity of the facilities is presently inadequate. The area is entirely built-out and no change in demand for park

services is anticipated within the CSA and adjacent to the CSA, consequently no changes to the existing SOI are necessary or recommended.

Table 10-10: CSA M-17 SOI Analysis

Issue	Comments
SOI update recommendation	Retain existing coterminous SOI.
Services provided	CSA M-17 provides park and recreation facility maintenance and recreation programming. All services are provided by private contractors.
Present and planned land uses in the area	The District bounds encompass the unincorporated communities of Montalvin Manor and Tara Hills. The CSA area is primarily residential with two schools, limited commercial properties along San Pablo Avenue, and the Richmond Parkway Transit Center next to Interstate 80.
Projected growth in the District/Recommended SOI	The CSA is entirely built-out, consequently, only limited infill growth is anticipated in the future.
Present and probable need for public facilities and services in the area	There is a present and probable need for park services. As the area is a built-out community consisting primarily of residences, the demand of park services is anticipated to remain constant in the future.
Opportunity for infill development rather than SOI expansion	An SOI expansion is not recommended at this time.
Service capacity and adequacy	CSA facilities do not have sufficient capacity to meet existing and future demand, according to California and County adopted park-acreage standards and goals. As of 2009, there is approximately 1.5 acres of parkland per 1,000 residents provided by the CSA, which fails to meet the California benchmark standard and the County General Plan parkland goal.
Social or economic communities of interest	Social communities of interest include the unincorporated communities of Montalvin Manor and Tara Hills. Economic communities of interest within the CSA include the businesses located along San Pablo Avenue and the landowners within the CSA that pay a portion of their property tax to the District.
Effects on other agencies	Retention of the existing SOI is not anticipated to have impacts on other service providers.
Potential for consolidations or other reorganizations when boundaries divide communities	Presently, consolidation is not necessary or feasible, as the CSA's boundaries do not divide a community and there is a lack of districts to consolidate with the CSA.
Location of facilities, infrastructure and natural features	Both of the CSA's facilities are located in the northwest corner of the District.
Willingness to serve	The CSA presently serves the area and is willing to continue to serve all areas within its boundaries.

Potential effects on agricultural and open space lands	The SOI recommendation for the District is not anticipated to directly impact agricultural and open space lands.
Potential environmental impacts	Although no potential environmental impacts were identified in the MSR, the LAFCO counsel and planner should make CEQA determinations.

CSA R-7

CSA R-7 Zone A provides park and recreation facility operation and maintenance and recreation programming in the unincorporated community of Alamo. CSA R-7 Zone B is presently inactive.

FORMATION AND BOUNDARY

CSA R-7 was formed on July 9, 1974 as a dependent special district of the County.[149] As a result of the incorporations of the Town of Danville and the City of San Ramon, the CSA was left with several non-contiguous areas. To simplify services to the areas, the County Board of Supervisors created zones A (Alamo) and B (Bishop Ranch area) in 1984.[150] CSA R-7 (Zone B) is presently inactive with no funding sources and no expenditures, according to County financial records. It is unclear when Zone B became inactive. The boundary area of CSA R-7 (Zone A) is approximately 8.2 square miles, or 5,254 acres. The SOI for CSA R-7 is coterminous with the boundary of Zone A.

Boundary History

Since formation, the CSA has had 27 boundary changes—10 detachments and 17 annexations. All changes to the CSA in both zones A and B are shown in Table 10-11.

Table 10-11: CSA R-7 Boundary Changes

Name	LAFCO Reso./Date	Change Type	Recording Agency[1]
Blackhawk Reorg.	6/18/1975	Detach	Both
Blackhawk Reorg. 2	4/20/1977	Detach	Both
Subdivision 4943 Reorg.	5/4/1977	Annex	Both
Subdivision 4894 Reorg.	12/7/1977	Annex	Both
Subdivision 5253 Reorg.	9/6/1978	Annex	Both
Subdivision 5095 Annex.	11/1/1978	Annex	Both
Subdivisions 4937 & 5418 Annex.	2/7/1979	Annex	Both
Subdivision 5467 Reorg.	4/4/1979	Annex	Both
Subdivision 4820 Reorg.	6/13/1979	Detach	Both
Subdivision 5521 Annex.	2/20/1980	Annex	Both
Del Rapini Reorg.	6/10/1980	Annex	Both
Subdivision 5681 Annex.	80-31	Annex	Both
Subdivision 5564 Reorg.	81-20	Annex	Both
Michael Gee Reorg.	81-35	Detach	LAFCO
Subdivision 5555 Annex.	81-87	Annex	Both
MS 67-81 Reorg.	82-36	Annex	Both
MS 34-80 Annex.	82-40	Annex	Both
CSA R-7 Detach.	84-27	Detach	Both
Canyon Lakes Reorg.	5/30/1985	Annex	BOE
Alcosta 2 Reorg. (R-7B)	86-16	Detach	LAFCO
Bogue Ranch Reorg.	86-27	Annex	LAFCO
Alcosta III Reorg. (R-7B)	86-35	Detach	LAFCO
NME Hospital Site Reorg. (R-7B)	87-20	Detach	LAFCO
Alcosta IV Reorg. (R-7B)	87-36	Detach	LAFCO
Central San Ramon I & II Reorg. (R-7B)	87-58	Detach	LAFCO
Alamo Summit Reorg. (R-7A)	91-33	Annex	LAFCO
Stonebridge Creek Reorg. (R-7A)	94-3	Annex	LAFCO

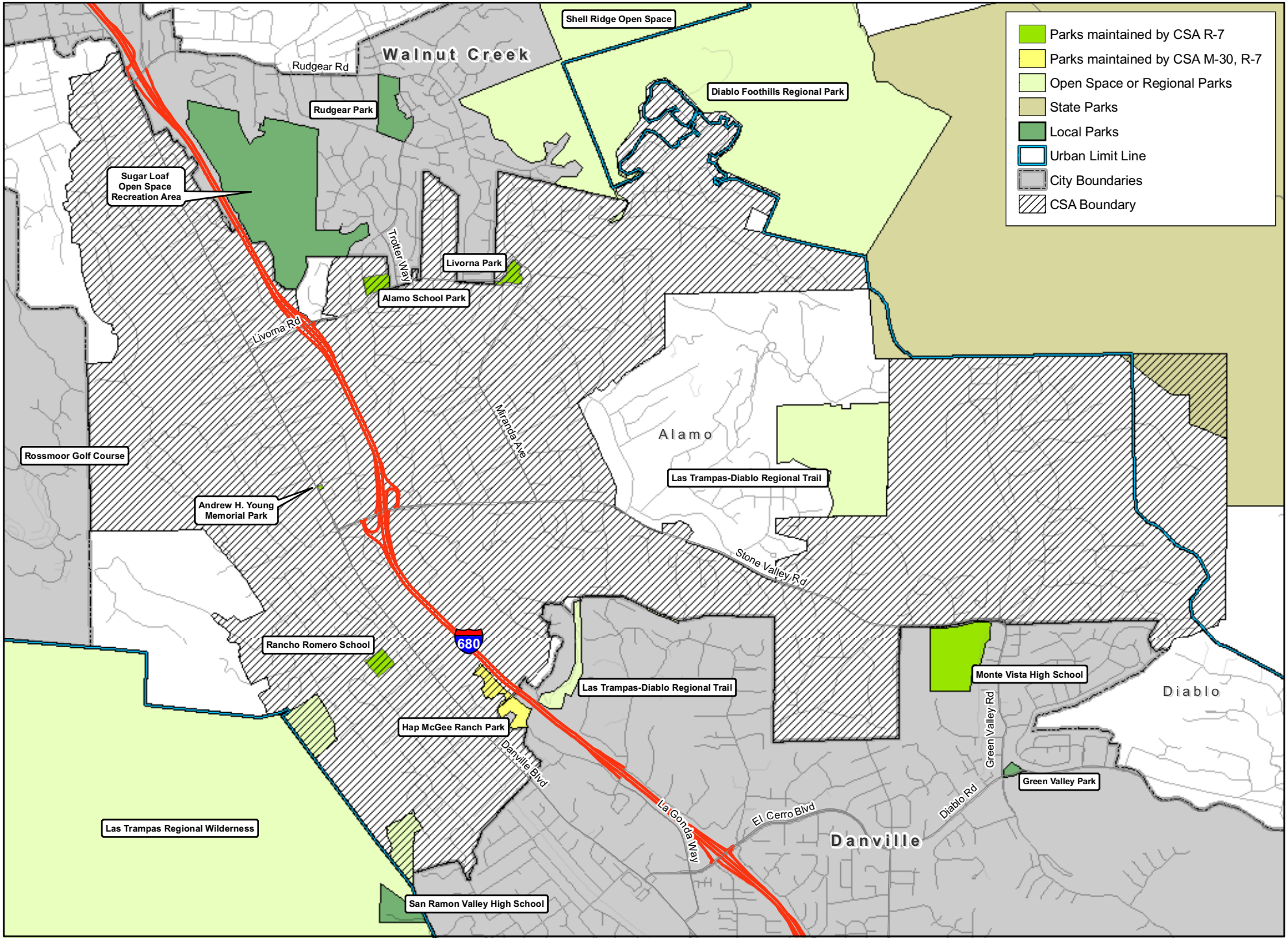
Note:
(1) Recording agency indicates whether Contra Costa LAFCO or the Board of Equalitzation (BOE) maintains records of the particular boundary change.

[149] Board of Equalization official date.

[150] The County Board of Supervisors creates and dissolves zones within CSAs. LAFCO has no jurisdiction over zones within a CSA.

Map 10-6

CSA R-7 and Coterminous Sphere of Influence



Map created: 3/24/2010
by Contra Costa County Community Development, GIS Group
651 Pine Street, 4th Floor North Wing, Martinez, CA 94553-0095
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SERVICE DEMAND AND GROWTH

The bounds of CSA R-7 encompass the unincorporated community of Alamo to the north of the Town of Danville and south of the City of Walnut Creek, excluding the Round Hill Area. CSA R-7 Zone A is not within the SOI of a neighboring city. The area within the CSA is essentially a built-out community primarily zoned for residential uses, with lots of at least 0.5 acres, and agricultural uses. Commercial uses are limited to the Alamo Plaza Shopping Center located adjacent to Interstate 680.

The CSA considers its customer base to be the approximately 4,976 homeowners within the CSA's boundaries. The estimated population within the CSA is 13,395.[151] The CSA's population density is 1,632 per square mile, compared with the 2009 countywide density of 1,473. The area has experienced significant recent growth of approximately 15 percent between 2000 and 2008.[152] However, growth in the future will be limited to lot splits for second residential units and infill which is projected to average approximately 25 units annually based on permit applications received by the County in 2006 and 2007.[153] The projected population within the CSA by 2025 is 13,880.

The CSA is a dependent special district of the County, and is not a land use authority. The County is the land use authority, and holds responsibility for implementing growth strategies.

[151] Based on the average household population of 2.7 for unincorporated Contra Costa County in 2009, according to the Department of Finance.

[152] Growth estimate based on U.S. Census Bureau data and the 2008 population estimate for the Alamo unincorporated area as published in the Alamo Comprehensive Fiscal Analysis.

[153] LAFCO, Comprehensive Fiscal Analysis for the Proposed Incorporation of the Town of Alamo, 2008, p. 13.

FINANCING

Table 10-12: CSA R-7 Zone A Financial Information, FY 08-09

CSA R-7 Zone A, FY 08-09			
General Financing Approach			
In FY 08-09, parks and recreation services in the CSA were financed primarily by property taxes (94%) and interest (4%). Total expenditures consisted primarily of payments to contracting service providers for maintenance (46%) and recreation services (11%), payments for capital outlays (26%), and reimbursement to the County for administration and maintenance services (13%).			
Revenues		**Expenditures**	
Total Available Funding	$4,066,234	Total Expenditures	$803,635
Beginning Fund Balance	$3,163,507	Administration	$105,031
Total Operating Revenues	$902,727	Facility Maintenance	$368,369
Property Tax	$851,778	Recreation & Senior Services[3]	$91,490
Park & Recreation Fees[1]	$3,986	Capital Outlays	$204,945
Other General Fund[2]	$8,416	Other[4]	$33,800
Interest	$38,547		
Notes:			
(1) Park and recreation fees include fees for recreation services, facility rentals and concessions.			
(2) Other general fund sources include sources other than those listed separately (i.e., park and recreation fees, property tax).			
(3) The CSA does not currently provide senior services.			
(4) Other includes reimbursements to CSA M-17 for a transfer made in error.			

PARK AND RECREATION SERVICES

Nature and Extent

CSA R-7 Zone A provides park and recreation facility operation and maintenance and recreation programming. Park maintenance services within the CSA are provided in conjunction with multiple other service providers. The County provides maintenance for the Alamo Elementary School ballfields, Livorna Park (private contractor for restrooms), and Andrew H. Young Park. The County (CSA R-7) and the Town of Danville jointly fund maintenance of Hap Magee Ranch Park, with the Town performing the maintenance activities. San Ramon Valley Unified School District provides maintenance for Rancho Romero School Park and the Monte Vista High School pool.

Recreation programming is provided by the CSA. Recreation programming includes a free summer concert series, youth entertainment at the annual Rotary Alamo Music Festival, an annual doggie day, and an annual multi-cultural festival. The Alamo MAC reported that the CSA does not currently provide recreation programming for seniors, which is a need in the community of Alamo due to the large population of seniors. Currently, seniors in Alamo attend senior programs in Danville or Walnut Creek, and must pay non-resident fees.

Location

CSA services are provided to the unincorporated community of Alamo. The CSA is staffed and served by County Public Works staff, who are responsible for providing services throughout the

unincorporated areas of the County. All CSA financed facilities are located within the CSA's boundaries, with the exception of the Monte Vista High School pool, which is located adjacent to the CSA boundaries in the Town of Danville and Hap Magee Ranch Park which is located partially within the Town of Danville (9.1 acres) and partially within unincorporated Contra Costa County (8.1 acres).

Non-residents may use the CSA's facilities, but must pay a non-resident fee for recreation programming and facility rentals.

Parks and Recreation Facilities

Park and recreation facilities serving the CSA include five parks located within the CSAs bounds. Two of the parks are owned by the County and three parks and the pool are offered through agreements with the San Ramon Valley Unified School District and the Town of Danville.

All of the park facilities and recreation facilities were constructed after 1991. All facilities were identified by the County as being in excellent condition.[154] The County's Capital Improvement Plan outlines the following plans for improvements to these facilities, estimated to be completed between 2009 and 2011:[155]

- Andrew H. Young Park ($1.3 million) – improve access, tree lighting, restrooms, upgraded irrigation, and improve drainage.[156]
- Alamo Elementary School ($1.7 million) – ballfield improvements, restrooms, upgrade irrigation and improve drainage, improve access, new BBQs and play area equipment.
- Hap Magee Ranch Park ($1.8 million) – renovate playground, picnic area, and the Cottage patio, parking areas, improve landscaping, construct restrooms, upgrade irrigation, and improve drainage.
- Livorna Park ($2.8 million) – upgrade irrigation, improve drainage, construct restrooms, new play areas and picnic areas, improve access.
- Rancho Romero School ($25,000) – install pedestrian paths, picnic tables and BBQs.

Installing shade structures at the Rancho Romero School (on ball field dugouts and on the upper playground) and at the Monte Vista High School Pool were identified by the Alamo MAC as needs.

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[154] Park facilities were reportedly built within the last 15 years; however, comments on the public review draft MSR suggested that some facilities have reached their full life expectancy, with replacements needed within the next few years.

[155] The Alamo MAC reported that many of the capital needs listed in the County Parks CIP for CSA R-7 have already been completed, are not necessary, or were never discussed with the MAC. It is recommended that the County and Alamo MAC collaborate to jointly plan future capital improvements at CSA R-7 parks.

[156] The Alamo MAC reported that there is no need for restrooms at Andrew Young Park. It is a small pocket park where visitors do not stay long, and it is located immediately adjacent to commercial areas which contain restaurants, service stations and store bathrooms.

There are no plans for additional facilities in the CSA at this time.

CSA R-7 facilities do not have sufficient capacity to meet existing and future demand, according to California and County adopted park-acreage standards and goals. As of 2009, there is approximately 2.2 acres of total parkland per 1,000 residents provided by the CSA or one acre of neighborhood parkland per 1,000 residents, which fails to meet the California benchmark of three to five acres per 1,000 residents[157] and the County General Plan goal of 4 acres of total park facilities and 2.5 acres of neighborhood park facilities per 1,000 population.[158] In order to meet the General Plan goal, the CSA would need an additional 24 acres of total parkland, of which, at least 20 acres would need to consist of neighborhood parkland.

The Alamo MAC reported that the CSA needs to make the acquisition of additional parkland a high priority, and that the CSA should make it a priority to use its available reserve funds to develop and acquire additional parkland for its residents or to develop school property such as Stone Valley Middle School into additional parkland. Although the community is largely built out, the MAC reported that there are pockets of vacant land that could be pursued by CSA.

While the area within the CSA lacks sufficient neighborhood park acreage, there are several regional and community parks within the vicinity of the CSA. Park and open space facilities available for CSA resident use that are within 0.5 miles of the boundaries of the CSA include the Oak Hill Community Park in the Town of Danville (43 acres), the Diablo Foothills Regional Park (1,060 acres) owned by East Bay Regional Park District, Rudgear Park (16 acres) in the City of Walnut Creek, and East Bay RPD open space.

The CSA has partnered with the San Ramon Valley Unified School District and the Town of Danville to provide additional park facilities in the area. The CSA provides park maintenance services through the County at the Alamo Elementary School and pays for park improvements at Alamo Elementary and Rancho Romero School in exchange for public use of the facilities. In 2000, the CSA entered into an agreement with the Town of Danville, Pool 2000 (a community citizens committee) and SRVUSD to finance the development, operation and maintenance of a pool at Monte Vista High School in the Town of Danville. Per the agreement, the school district maintains the facility, and the pool is open for town and CSA use in the evenings, on the weekends, and during the summer. The County and the Town of Danville jointly own and fund the maintenance of Hap Magee Ranch Park, while the Town of Danville performs the maintenance at the facility. No other opportunities for facility sharing were identified.

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[157] For developer park dedication requirements (i.e., "Quimby" fees), California statute (Government Code §66477(a)(2)) sets a benchmark of three to five acres per 1,000 residents

[158] Contra Costa County, *General Plan 2005-2020*, 2005, p. 9-22.

Table 10-13: CSA R-7 Zone A Park and Recreation Services

CSA R-7 Zone A Park and Recreation Service Adequacy and Facilities						
Service Configuration						
Park Maintenance	Direct and by contract	Recreation Programming			Direct	
Service Adequacy[1]						
Maintained Park Acres	30.3	Total Park Acres per 1,000[3]			2.3	
Active Parkland	8.4	Active Parkland per 1,000			0.6	
Passive Parkland	21.8	Passive Parkland per 1,000			1.6	
Recreation Attendance[2]	1,900	Recreation Attendance per Resident			0.1	
Recreation Cost per Resident	$6.83	Park Maintenance Cost per Acre[4]			$23,329	
Recreation Facilities and Parks						
Name	**Location**	**Property Owner**	**Park Type**	**Facilities**	**Condition**	**Acres**
Andrew H. Young Park	Danville Blvd & Jackson Way	County	Passive	Playground structure, picnic tables	Excellent	0.2
Alamo Elementary School and Park	100 Wilson Rd., Alamo	San Ramon Valley USD	Active	Baseball field, batting cage, soccer field, pathway system, picnic & BBQ area, 2 sport courts	Excellent	3.1
Hap Magee Ranch Park[5]	1025 La Gonda Way, Danville	Public Facilities Corporation (CCC and Danville)	Passive	Historic structures, walking and jogging path, open play area, picnic facilities	Excellent	17.2
Rancho Romero School Sports Field and Park	184 Hemme Ave., Danville	San Ramon Valley USD	Active	Ballfield, basketball court, soccer field, playground structure, BBQ, picnic facility	Excellent	5.4
Monte Vista High School Pool	3131 Stone Valley Rd., Danville	San Ramon Valley USD	Active	Pool	Excellent	-
Livorna Park	2615 Miranda Ave, Danville	County	Passive	Gazebo, volleyball court, grassy play area, sport court, playground	Excellent	4.4

Notes:
(1) Active parkland consists of developed parkland with active recreation programming and sports facilities, such as active ball courts (e.g., basketball or tennis), delineated sports fields (e.g., soccer, baseball, softball), aquatic facilities, gymnasiums, etc. Passive parkland consists of developed or undeveloped parkland containing trails, walkways, cultural or scenic resources, open fields, picnic tables/shelter, tot lots, etc., but not containing facilities used for active recreation programming.
(2) The County Department of Public Works tracks approximate attendance at each recreation event.
(3) Acres per 1,000 population based on average household size.
(4) Maintenance cost per acre does not include those facilities for which the CSA does not finance maintenance.
(5) Hap Magee Ranch Park serves CSA R-7, CSA M-30 and the Town of Danville; however, maintenance of the park is split between the County and Town, with the County funding maintenance of 8.1 acres.

CSA R-7 GOVERNANCE ALTERNATIVES

CSA R-7 Zone A is active and is anticipated to continue offering park and recreation services in the future. CSA R-7 Zone A encompasses the bounds of CSA M-30 with the exception of approximately seven acres adjacent to the Town of Danville. Residents within CSA M-30 pay a benefit assessment to the County, which is transferred to the Town for enhanced parks and recreation, law enforcement, street maintenance, landscaping, and street lighting. The residents within CSA M-30 are also paying property taxes to CSA R-7 for park and recreation services. CSA M-30 residents are paying for park and recreation services to two CSAs and there are no park facilities within the CSA. The nearest park facility is Hap Magee Ranch Park, which lies partially within the Town of Danville and unincorporated Contra Costa County, and is jointly owned and maintained by the County (CSA R-7) and the Town (supplemented with CSA M-30 funds). The nearest County-owned facility solely financed by CSA R-7 funds is Andrew H. Young Park, which is approximately one mile from the border of CSA M-30. One governance alternative may be the removal of the territory in CSA M-30 from CSA R-7. Another option may be the consolidation of the two CSAs into a single CSA. Such a CSA would require a zone for the area formerly within CSA M-30 to maintain the financing mechanism for enhanced services provided by the Town of Danville per the agreement between the Town and the County.

LAFCO has identified consolidation of CSA R-7 with GVRPD as a possible option to improve the operations of GVRPD. GVRPD is located adjacent to the CSA, just south of Stone Valley Road and east of Green Valley Road. Consolidation of the two districts may enhance the operation and maintenance of the Green Valley Pool; however, County Public Works is opposed to this governance alternative. Public Works reported that there are not adequate financial resources to cover the additional costs for maintenance and capital improvements for the pool. In addition, members of the Alamo community, the Alamo MAC and District III County Supervisor expressed opposition to such a consolidation.

CSA R-7 Zone B is presently inactive and should be considered for dissolution by the County Board of Supervisors and the area detached from the CSA by LAFCO.

CSA R-7 MSR DETERMINATIONS

<u>Growth and population projections</u>

1) The estimated 2009 residential population within the district was 13,395. Population growth between 2000 and 2008 was approximately 15 percent. The projected population within the CSA by 2025 is 13,880.

2) Future growth will be limited to lot splits for second residential units and infill which is projected to average approximately 25 units annually.

<u>Present and planned capacity of public facilities and adequacy of public services, including infrastructure needs and deficiencies</u>

3) As of 2009, there is approximately 2.2 acres of total parkland per 1,000 residents provided by the CSA or one acre of neighborhood parkland per 1,000 residents.

4) CSA R-7 Zone A facilities do not have sufficient capacity to meet existing and future demand, according to California and County adopted park-acreage standards and goals. In

order to meet the General Plan goal, the CSA would need an additional 24 acres of total parkland, of which, at least 20 acres would need to consist of neighborhood parkland.

5) While the area within the CSA lacks sufficient neighborhood park acreage, there are several regional and community parks provided by other agencies within 0.5 miles of the CSA, which include Oak Hill Community Park in the Town of Danville, the Diablo Foothills Regional Park owned by East Bay Regional Park District, Rudgear Park in the City of Walnut Creek, and East Bay RPD open space.

6) Recreation programming is limited to annual special events. For additional recreation programming, CSA residents must join programs in the neighboring cities of Danville and Walnut Creek and pay non-resident fees.

7) Various infrastructure needs for CSA R-7 parks were identified in the County Parks CIP. The Alamo MAC reported that infrastructure is in good condition, as facilities were all built within the last 15 years, and few capital needs exist. It is recommended that the County and Alamo MAC collaborate to jointly plan future capital improvements at CSA R-7 parks.

8) The District has an up-to-date capital improvement plan; however, it appears to operate as a complete list of needs rather than a plan of when capital funding will become available for necessary improvements.

Financial ability of agencies to provide services

9) County staff reported that the current level of financing is not sufficient for adequate service provision, and there are significant capital needs which have not been addressed because the current financing level is not adequate. However, members of the CSA advisory committee report that the financing level is sufficient as the CSA has run a surplus every year, and has only minimal capital needs.

Status of, and opportunities for, shared facilities

10) The CSA practices extensive facility sharing through financing and maintenance agreements with San Ramon Valley Unified School District and the Town of Danville. These agreements provide access to four additional park and recreation facilities for CSA residents.

11) No further opportunities for facility sharing were identified by the County; however, the Alamo MAC identified future facility sharing possibilities at Stone Valley Middle School.

Accountability for community service needs, including governmental structure and operational efficiencies

12) Accountability to local voters is achieved through the MAC. The MAC acts as a sounding board for the community to voice local preferences to the County regarding park and recreation services in the CSA.

13) The CSA demonstrated accountability and transparency by disclosing financial and service related information in response to LAFCO requests.

14) Opportunities for consolidation include consolidation with CSA M-30 or GVRPD.

15) CSA R-7 Zone B is presently inactive and should be considered for dissolution by the County Board of Supervisors, and the area detached from the CSA by LAFCO.

CSA R-7 SOI RECOMMENDATIONS AND DETERMINATIONS

The existing SOI for CSA R-7 is coterminous with the bounds of Zone A. The SOI for the District was affirmed by LAFCO in 2004.

Agency Proposal

The County did not propose any changes to the CSA's existing SOI.

SOI Options

Given the considerations addressed in the MSR, three options are identified for the CSA R-7 SOI:

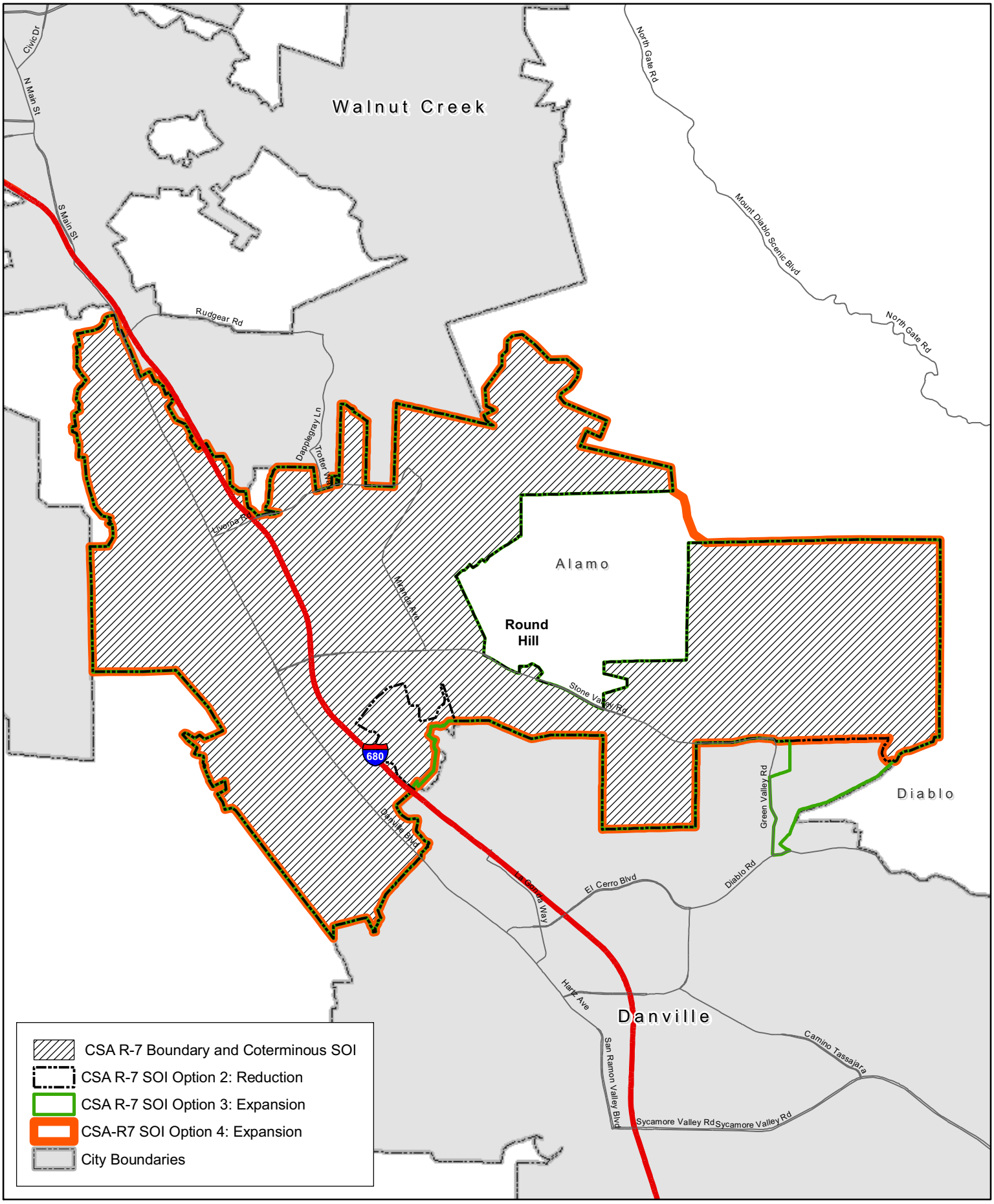
SOI Option #1 – Retain existing coterminous SOI for CSA R-7 Zone A

If LAFCO determines that the existing government structure is appropriate, then the existing SOI should be retained. This option would enable the district to continue to include the areas within its SOI in its long-term planning. Such an SOI would indicate that LAFCO anticipates Zone B of CSA R-7 will remain inactive the area will eventually be detached from the CSA.

SOI Option #2 – SOI reduction for CSA R-7

CSA R-7 Zone A encompasses the bounds of CSA M-30 with the exception of approximately seven acres adjacent to the Town of Danville. Residents within CSA M-30 pay a benefit assessment to the County, which is transferred to the Town for enhanced parks and recreation, law enforcement, street maintenance, landscaping, and street lighting. The residents within CSA M-30 are also paying property taxes to CSA R-7 for park and recreation services. Consequently, CSA M-30 residents are paying for park and recreation services to two CSAs and there are no park facilities within CSA M-30's boundaries. An SOI reduction that excludes the area within CSA M-30 from CSA R-7 may be an option.

Map 10-7 CSA R-7 SOI Options Two, Three, and Four



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SOI Option #3 – SOI expansion for CSA R-7 to include GVRPD

LAFCO has identified consolidation of CSA R-7 with GVRPD as a possible option to improve the operations of GVRPD.[159] GVRPD is located adjacent to the CSA, just south of Stone Valley Road and east of Green Valley Road.

In October 2009, a two-year deadline was set for GVRPD to return to LAFCO with a status report on governance options. LAFCO stressed that GVRPD is not an appropriate special district and would never be formed today. An expansion of CSA R-7's SOI to include the area within GVRPD would indicate that LAFCO anticipates the eventual consolidation of the two districts. An additional zone could be created within CSA R-7 to separately account for the property taxes paid by landowners formerly within GVRPD.

SOI Option #4 – SOI expansion for CSA R-7 to include Round Hill

Expanding the CSA R-7 SOI to include the Round Hill area was identified as an SOI option by LAFCO Commissioner Burke. Round Hill is the only area of the Alamo community presently excluded from the CSA, and the CSA almost completely surrounds the Round Hill area. Round Hill residents frequent CSA R-7 parks and attend CSA-sponsored activities, although a fee is required for recreation programs attended by Round Hill residents. The CSA's main facility, Livorna Park, is located closer to Round Hill Country Club than to any other defined neighborhood in Alamo.

Recommendation

The recommended SOI for CSA R-7 is to reduce its SOI to exclude the areas that are presently within the CSA M-30 boundaries to eliminate duplication of services in the area. A recommendation regarding the possibility of expanding CSA R-7's SOI to include the area within GVRPD is pending GVRPD's report to LAFCO in October 2011.

Table 10-14: CSA R-7 SOI Analysis

Issue	Comments
SOI update recommendation	Reduce the SOI for CSA R-7 to exclude the area within CSA M-30.
Services provided	CSA R-7 Zone A provides park and recreation facility operation and maintenance and recreation programming. Zone B of the CSA is presently inactive.
Present and planned land uses in the area	The area within CSA R-7 Zone A is essentially a built-out community primarily zoned for residential uses, with lots of at least 0.5 acres, and agricultural uses. Commercial uses are limited to the Alamo Plaza Shopping Center located adjacent to Interstate 680.
Projected growth in the District/Recommended SOI	Growth within Zone A of the CSA in the future will be limited to lot splits for second residential units and infill which is projected to average approximately 25 units annually.

[159] Contra Costa LAFCO, Meeting Minutes, October 14, 2009.

Present and probable need for public facilities and services in the area	There is a present and probable need for park services. As the area is a built-out community consisting primarily of residences, the demand of park services is anticipated to remain constant in the future.
Opportunity for infill development rather than SOI expansion	An SOI expansion is not recommended at this time.
Service capacity and adequacy	CSA R-7 facilities do not have sufficient capacity to meet existing and future demand, according to California and County adopted park-acreage standards and goals. In order to meet the General Plan goal, the CSA would need an additional 24 acres of total parkland, of which, at least 20 acres would need to consist of neighborhood parkland. Limited recreation programming is provided within the CSA, and residents must travel to a neighboring city for additional recreation programming.
Social or economic communities of interest	Communities of interest within the CSA include the unincorporated community of Alamo and the landowners within the District that pay a portion of their property tax to the CSA.
Effects on other agencies	An SOI reduction, and eventual removal of the areas in CSA M-30 from CSA R-7, would likely have little impact on other agencies given the small size of the CSA (26 dwelling units). The CSA M-30 area would continue receiving park and recreation services from the Town of Danville.
Potential for consolidations or other reorganizations when boundaries divide communities	Potential opportunities for consolidation include consolidation with CSA M-30 to eliminate duplication of park and recreation services and consolidation with GVRPD to streamline the operation and maintenance of the Green Valley Pool.
Location of facilities, infrastructure and natural features	All CSA financed facilities are located within the CSA's boundaries, with the exception of the Monte Vista High School pool, which is located adjacent to the CSA boundaries in the Town of Danville.
Willingness to serve	The CSA presently serves the area and is willing to continue to serve all areas within its boundaries.
Potential effects on agricultural and open space lands	The SOI recommendation for the District is not anticipated to directly impact agricultural and open space lands.
Potential environmental impacts	Although no potential environmental impacts were identified in the MSR, the LAFCO counsel and planner should make CEQA determinations.

CSA R-9

CSA R-9 provides park facility operation and maintenance in the unincorporated community of El Sobrante.

FORMATION AND BOUNDARY

CSA R-9 was formed on December 17, 1974 as a dependent special district of the County.[160] According to Board of Equalization records, the CSA was dissolved in 1993; however, neither the County Board of Supervisors nor LAFCO have a record of the CSA being dissolved. As the CSA does not receive property tax revenue, it is not necessary for the District to be on the BOE Role for the tax rate area system. No action is required at this time by LAFCO or the County to correct this inconsistency.[161]

Table 10-15: CSA R-9 Boundary Changes

Name	LAFCO Reso./Date	Acres	Change Type	Recording Agency[1]
Travalini Reorg.	6/13/1979	NA	Annex	Both
Ming Reorg.	81-6	1.86	Detach	Both
Dias Reorg.	84-3	0.44	Annex	Both
Quintal Reorg.	84-24	0.13	Detach	LAFCO
Greenridge Reorg.	86-23	0.28	Annex	Both
Castro Pointe-Carriage Hill S. Reorg.	86-45	141.06	Detach	Both
Bauer-Hawkins Reorg.	87-1	1.94	Detach	LAFCO
Valley View Reorg.	89-33	0.91	Detach	Both
Laurel Lane Reorg.	89-36	6.07	Detach	Both
Edwards Reorg.	90-14	1.05	Detach	Both

Notes:
1) Recording agency indicates whether Contra Costa LAFCO or the Board of Equalitzation maintains records of the particular boundary change.
2) NA indicates that acreage is not available in the LAFCO records.

The boundary area of the CSA is approximately 3.1 square miles, or approximately 1,984 acres. The CSA is comprised of four non-contiguous areas. The SOI for CSA R-9 is coterminous with the boundary of the CSA.

Boundary History

Since formation, the CSA has had 10 boundary changes—seven detachments and three annexations. All boundary changes to the CSA are shown in Table 10-15.

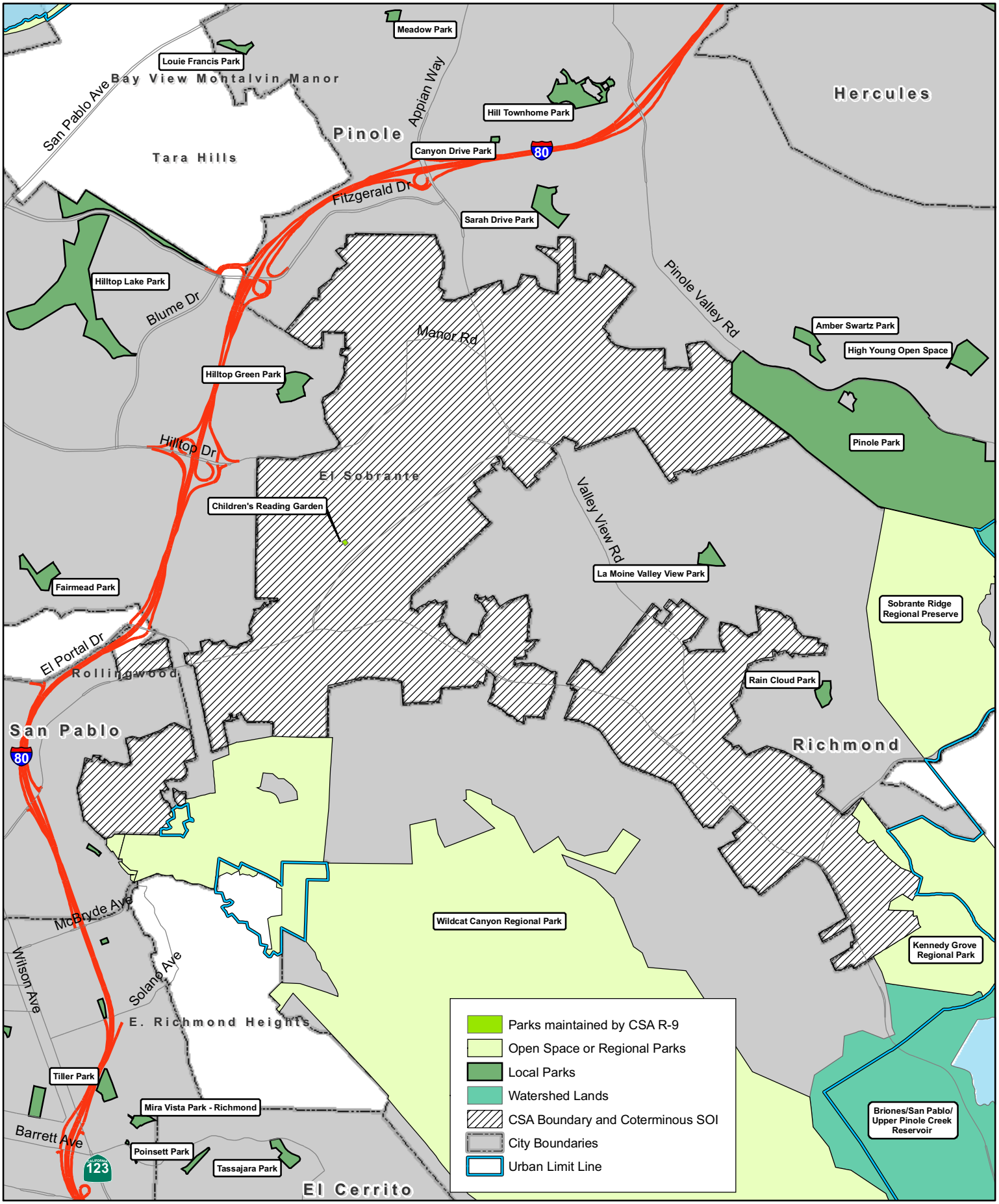
SERVICE DEMAND AND GROWTH

CSA R-9 is located immediately south of the City of Pinole, adjacent to the City of Richmond in the east, west and south, with the southwest corner of the CSA abutting the City of San Pablo. The CSA is almost entirely within the City of Richmond's SOI with the exception of a small portion in the north that lies within the City of Pinole's SOI and the southwestern most island, which is in the City of San Pablo's SOI.

[160] Board of Equalization official date.

[161] Interview with Ralph Davis, Board of Equalization Property and Special Taxes Department, Research Manager, February 23, 2010.

Map 10-8 CSA R-9 and Coterminous Sphere of Influence



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The district bounds encompass a wide variety of land uses but is primarily comprised of high-density residential areas with single family residences on 6,000 to 10,000 square-foot lots and multifamily residential areas with up to 29 units per acre. There is also retail commercial along San Pablo Dam Road and Appian Way and minimal agricultural, neighborhood business, office space and large single family residential uses spread throughout the CSA.

The District considers its customer base to be the residents of the CSA. There were approximately 12,260 residents within the CSA as of the 2000 Census. It is estimated that as of 2009, there was a population of 12,750 within the CSA.[162] The CSA's population density is 4,113 per square mile, compared with the 2009 countywide density of 1,473. The area has experienced minimal recent growth with in-fill development and minor subdivision projects, and only limited future growth is projected. The projected population within the CSA by 2025 is 13,165. Future population growth is not anticipated to significantly increase service demand.

The CSA is a dependent special district of the County, and is not a land use authority. The County is the land use authority, and holds primary responsibility for implementing growth strategies.

FINANCING

With the exception of park dedication fees from developers, the CSA has no other fixed revenue sources. The CSA has floated an assessment measure to the land owners twice in 1985 and 1998 to gain additional revenues; however, the measure failed on both occasions. The County Special Districts Coordinator reported that CSA R-9 has sufficient revenues for the next five years, at existing maintenance service levels, at which point a new revenue source will need to be secured.[163]

Table 10-16: CSA R-9 Financial Information, FY 08-09

CSA R-9, FY 08-09			
General Financing Approach			
In FY 08-09, parks and recreation services in the CSA were financed by park dedication and developer in lieu fees. Expenditures consisted primarily of construciton and engineering costs for the Children's Reading Garden (75%) and maintenance of the garden (22%).			
Revenues		**Expenditures**	
Total Available Funding	$49,231	Total Operating Expenditures	$49,231
Beginning Fund Balance	$32,447	Administration	$1,664
Total Operating Revenues	$16,784	Facility Maintenance	$10,782
Park Dedication Fees/ Developer In Lieu	$16,784	Capital Outlays[1]	$36,785
Note: (1) Capital outlays indude project planning, engineering and construction of the Children's Reading Garden.			

[162] 2009 population based on City of Richmond growth rate (4%) since 2000 applied to the CSA's 2000 Census population.

[163] Interview with Susan Cohen, Contra Costa County Special Districts Coordinator, February 25, 2010.

PARK AND RECREATION SERVICES

Nature and Extent

CSA R-9 provides park facility operation and maintenance in the unincorporated community of El Sobrante. While in the past the CSA has provided funding to the Richmond Unified School District for improved play equipment and sport fields, as of 2005, the CSA has primarily provided funding for the construction and operation of the Children's Reading Garden at the El Sobrante Library in cooperation with the library, community members and the Supervisor's office.

Location

CSA services are provided to the unincorporated community of El Sobrante. The CSA is staffed and served by County Public Works staff, who are responsible for providing services throughout the unincorporated areas of the County.

Non-residents may use the CSA's facilities at no additional charge, as residents of the CSA do not subsidize services through property taxes or other special taxes or assessments.

Parks and Recreation Facilities

Parks and recreation facilities serving the CSA include the Children's Reading Garden located at the county library in El Sobrante. The garden's construction was completed in 2007 and offers an area for children to read and an area for public reading events. The County reported that the garden is in good condition. No needs or deficiencies were identified for the garden.

According to the County's Parks CIP, the CSA plans to provide funding for improvements at four Richmond Unified School District schools and a new park totaling $10.8 million between 2010 and 2011; however, there is presently no funding for these plans. Plans for park facility improvements include the following:

- DeAnza High School ($5 million) – swimming pool complex, restrooms, and picnic and BBQ areas.
- El Sobrante Elementary School ($0.5 million) – basketball court, volleyball court, play structure, playfield, and restrooms.
- Marie Murphy Elementary School ($1.1 million) – improve ballfields and play areas, and restrooms.
- Valley View Elementary ($0.3 million) – a proposed children's play area, sports court, restrooms, architectural and engineering costs at the school site.
- El Sobrante Community Park ($4 million) – a proposed new park of 5 acres with a sports court, picnic areas, and children's play area.

CSA R-9 facilities do not have sufficient capacity to meet existing and future demand, according to California and County adopted park-acreage standards and goals. As of 2009, the reading garden provides minimal park acreage for the residents of the CSA. If school facilities are included as part

of the CSA's park facilities, there would be approximately 2.3 acres of parkland per 1,000 residents, which fails to meet the California benchmark of three to five acres per 1,000 residents[164] and the County General Plan goal of 2.5 acres of neighborhood park facilities per 1,000 population.[165] In order to meet the General Plan goal, the CSA would need an additional 2.5 acres of neighborhood parkland in addition to the existing school facilities, or 32 acres excluding school facilities.

Additional park facilities are available to CSA residents outside of the CSA's boundaries. Local park facilities within 0.5 miles of the CSA include the Lamoine Valley View Park (21.3 acres) and Rain Cloud Park (1.4 acres) in the City of Richmond, Sarah Drive Park (four acres) and Pinole Valley High School facilities (8.9 acres) in the City of Pinole. These neighboring facilities provide CSA residents access to an additional 37.9 acres of local parkland. Regional parkland and open space serving the area includes the Kennedy Grove Regional Recreation Area (222 acres) and Wildcat Canyon Regional Park (2,430 acres) owned and operated by the East Bay Regional Park District, and the Pinole Valley Park (231 acres) owned by the City of Pinole.

CSA R-9 practices facility sharing with the Children's Reading Garden, which is a joint project with the county library, community members and the District 1 Supervisor's office. An opportunity to share facilities with other agencies may include financing of Richmond Unified School District park facilities to promote public use of the school parks outside of school hours. The CSA would need to find additional financing sources to provide a regular revenue stream to the school district. The County did not identify any further opportunities for park or recreation facility sharing within CSA R-9.

Table 10-17: CSA R-9 Park and Recreation Services

CSA R-9 Park and Recreation Service Adequacy and Facilities						
Service Configuration						
Park Maintenance	Direct	Recreation Programming			None	
Service Adequacy[1]						
Maintained Park Acres	0.1	Total Park Acres per 1,000[2]			0.0	
Active Parkland	0.0	Active Parkland per 1,000			0.0	
Passive Parkland	0.1	Passive Parkland per 1,000			0.0	
Park Maintenance Cost per Acre	$107,820					
Recreation Facilities and Parks						
Name	**Location**	**Property Owner**	**Park Type**	**Facilities**	**Condition**	**Acres**
Children's Reading Garden	4191 Appian Way	County	Passive	Garden	Good	0.1

Note:
(1) Active parkland consists of developed parkland with active recreation programming and sports facilities, such as active ball courts (e.g., basketball or tennis), delineated sports fields (e.g., soccer, baseball, softball), aquatic facilities, gymnasiums, etc. Passive parkland consists of developed or undeveloped parkland containing trails, walkways, cultural or scenic resources, open fields, picnic tables/shelter, tot lots, etc., but not containing facilities used for active recreation programming.
(2) Acres per 1,000 population based on average household size.

[164] For developer park dedication requirements (i.e., "Quimby" fees), California statute (Government Code §66477(a)(2)) sets a benchmark of three to five acres per 1,000 residents

[165] Contra Costa County, *General Plan 2005-2020*, 2005, p. 9-22.

CSA R-9 GOVERNANCE ALTERNATIVES

As the CSA has no regular source of financing, lacks public interest to fill advisory committee positions, provides minimal services at a less than adequate service level, a governance alternative for CSA R-9 may be dissolution. Since 1974, the CSA has failed to find additional fixed funding sources other than developer fees to finance services. In addition, there is an apparent lack of constituent interest in the CSA's activities as the advisory committee presently has four vacant seats. The County reported that it is amenable to exploring options, including dissolution of this CSA, if a better and more efficient funding source is available to provide the same services to the public.[166]

Another possible governance alternative involves both CSA R-9 and Rollingwood-Wilart Park Recreation and Park District (RWPRPD). RWPRPD lies adjacent to the CSA in the west along Interstate 80, consisting of 109 acres of unincorporated Contra Costa County, located between the cities of San Pablo and Richmond. As part of the Request for Information by LAFCO to RWPRPD during the 2003-4 MSR cycle, LAFCO Executive Officer Annamaria Perrella identified dissolution of RWPRPD as a governance alternative, with the County named as the successor agency, to continue providing services to the area through a County Service Area. A governance alternative would be to consolidate RWPRPD with CSA R-9, and then merge the CSA R-9 advisory committee with the El Sobrante Municipal Advisory Council (ESMAC).[167] Such a governance alternative would improve local accountability and operations for both agencies, as MACs are regulated by adopted County policies, with requirements for meetings, training, operating procedures, and annual reports to the Board of Supervisors. MACs are generally well publicized and have sufficient public interest to retain a full council body. As of March 2010, the County had already been in discussions to combine the CSA R-9 advisory committee with ESMAC.

CSA R-9 MSR DETERMINATIONS

Growth and population projections

1) It is estimated that as of 2009, there was a population of 24,570 within the CSA. The area has experienced minimal recent growth. The projected population within the CSA by 2025 is 25,368.
2) There are no major planned or proposed developments located within the existing boundary and SOI of the District. Future growth is anticipated to be limited to in-fill and minor subdivision projects.

Present and planned capacity of public facilities and adequacy of public services, including infrastructure needs and deficiencies

3) CSA R-9 facilities do not have sufficient capacity to meet existing and future demand, according to California and County adopted park-acreage standards and goals. As of 2009,

[166] Correspondence with Susan Cohen, Contra Costa County Special Districts Coordinator, January 21, 2010.

[167] The process for performing this action would be to (a) disband the CSA Advisory Committee, (b) Amend the ESMAC resolution to add parks and recreation services, and (c) apply to LAFCO to activate the latent power to fund the services of a MAC per Government Code §25213(o).

the reading garden provides minimal park acreage for the residents of the CSA. If school facilities are included as part of the CSA's park facilities, there would be approximately 1.2 acres of parkland per 1,000 residents.

4) In order to meet the General Plan goal, the CSA would need an additional 32 acres of neighborhood parkland in addition to the existing school facilities.

5) Park facilities within 0.5 miles of the CSA include Lamoine Valley View Park and Rain Cloud Park in the City of Richmond, Kennedy Grove Regional Recreation Area and Wildcat Canyon Regional Park owned and operated by the East Bay Regional Park District, Pinole Valley High School facilities in the City of Pinole, Pinole Valley Park and Sarah Drive Park in the City of Pinole.

6) The most significant service challenge for CSA R-9 is the lack of a regular financing source. With the exception of park dedication fees from developers, the CSA has no other fixed revenue sources. The CSA has floated an assessment measure to the land owners twice in 1985 and 1998 to gain additional revenues; however, the measure failed on both occasions.

7) Infrastructure needs for the CSA include a new community park which will cost an estimated $5 million. In order to expand access to school parks outside of school hours, the County identified $6.9 million in needed repairs and improvements to four schools within the CSA.

8) The CSA has an up-to-date capital improvement plan; however, it appears to operate as a complete list of needs rather than a plan of when capital funding will become available for necessary improvements.

Financial ability of agencies to provide services

9) The CSA reports that the current level of financing is not sufficient for adequate service provision. There are significant capital needs which have not been addressed because the current financing level is not adequate to provide services.

10) The CSA needs a fixed revenue source to provide adequate services levels. The present revenue, which is limited to park dedication fees, is minimal and only allows for occasional capital outlays.

Status of, and opportunities for, shared facilities

11) CSA R-9 practices facility sharing with the Children's Reading Garden, which is a joint project with the county library, community members and the District 1 Supervisor's office.

12) An opportunity to share facilities with other agencies may include financing of Richmond Unified School District park facilities to promote public use of the school parks outside of school hours.

Accountability for community service needs, including governmental structure and operational efficiencies

13) Accountability is constrained by limited interest in serving on the CSA advisory committee. The advisory committee acts as a sounding board for the community to voice local preferences to the County.

14) The CSA demonstrated accountability and transparency by disclosing financial and service related information in response to LAFCO requests.

15) As the CSA has no regular source of financing, lacks public interest to fill advisory committee positions, provides minimal services at a less than adequate service level, a governance alternative for CSA R-9 may be dissolution.

16) It is recommended that the County Board of Supervisors consider combining the advisory functions of the CSA under the El Sobrante Municipal Advisory Council.

CSA R-9 SOI RECOMMENDATIONS AND DETERMINATIONS

The existing SOI for CSA R-9 is coterminous with its bounds. The SOI for the district was affirmed by LAFCO in 2004.

Agency Proposal

The County did not propose any changes to the CSA's existing SOI.

SOI Options

Given the considerations addressed in the MSR, three options are identified for the CSA R-9 SOI:

SOI Option #1 – Retain existing coterminous SOI

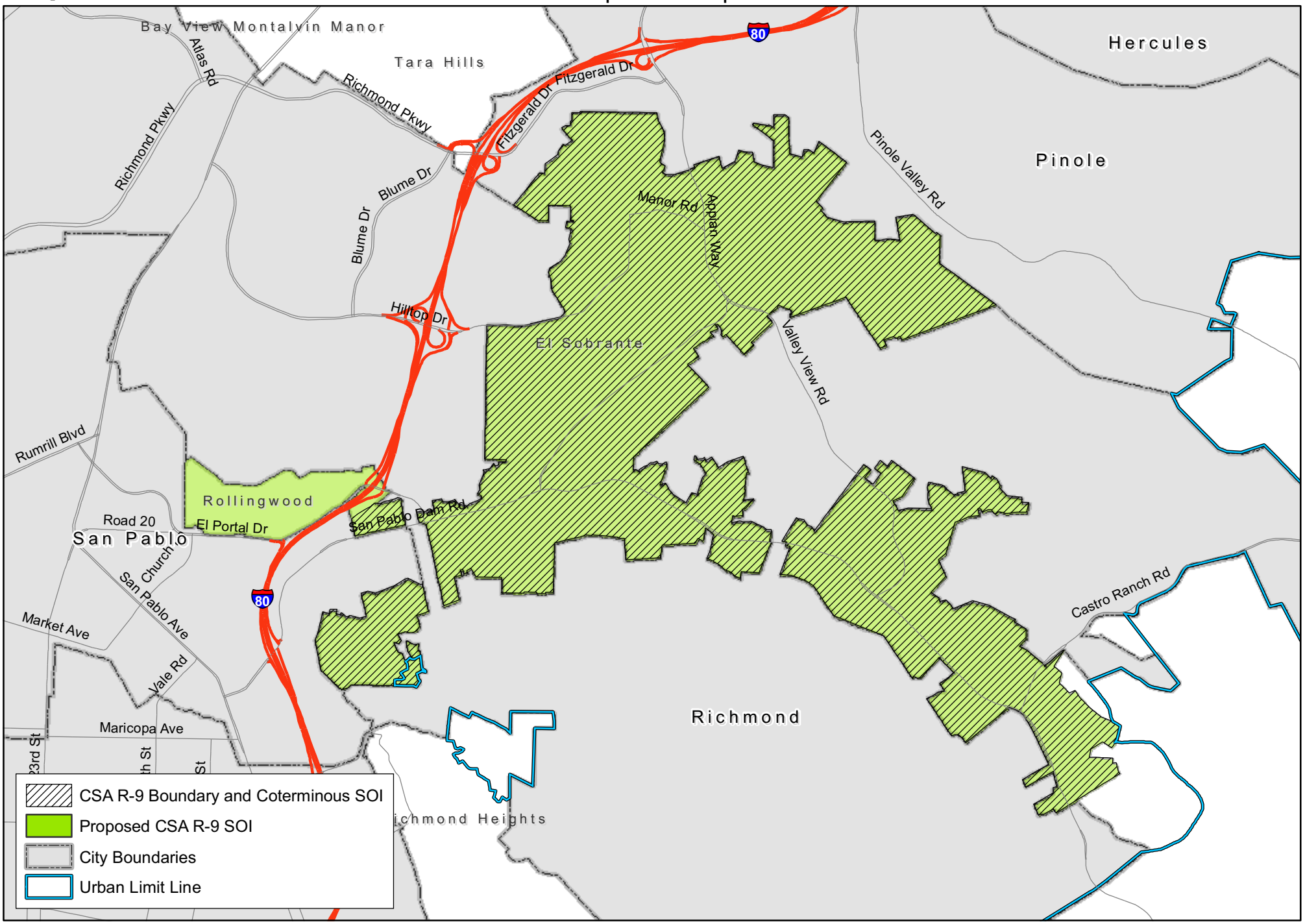
If LAFCO determines that the existing government structure is appropriate, then the existing SOI should be retained. This option would enable the district to continue to include the areas within its SOI in its long-term planning.

SOI Option #2 – Adopt a zero SOI

As the CSA has no regular source of financing, lacks public interest to fill advisory committee positions, provides minimal services at a less than adequate service level, a governance alternative for CSA R-9 may be dissolution. In the case of dissolution, the County would need to determine a means to ensure the continued maintenance of the 0.1 acre Children's Reading Garden. To indicate that LAFCO anticipates the eventual dissolution of the CSA, a zero SOI would be adopted.

Map 10-9

CSA R-9 SOI Expansion: Option Three



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SOI Option #3 – SOI expansion to include RWPRPD

A potential governance option may be consolidation of CSA R-9 and RWPRPD into a single CSA. By expanding CSA R-9's SOI, LAFCO would indicate that it anticipates the CSA would be the successor agency in the event of the dissolution of RWPRPD. RWPRPD lies adjacent to CSA R-9 and maintains and operates a single community center. Such a consolidation would improve accountability to RWPRPD constituents by having the County Board of Supervisors as the governing body of the CSA. Refer to the RWPRPD chapter for specific challenges faced by the District.

Recommendation

It is recommended that the Commission retain the CSA's existing coterminous SOI on a provisional basis. Given the recent success of the CSA in leveraging the support of various funding sources and the community to conceptualize and construct the Children's Reading Garden, El Sobrante's first park, the CSA may be able to capitalize on the momentum achieved and find funding sources to continue construction and maintenance of additional parks. For this reason, it is not recommended that a zero SOI be adopted, or the CSA dissolved at this time. If the CSA fails to improve service levels, or find a more permanent revenue source by the next round of SOI updates in 2015, it is recommended that the Commission consider the dissolution of the CSA.

Consolidation with RWPRPD is not recommended at this time given that both districts face service and community interest challenges. Consolidation with another district with similar service and community interest challenges would add to the challenges already faced by CSA R-9.

In order to enhance local accountability, the County Board of Supervisors may wish to consider merging the CSA R-9 advisory committee with the El Sobrante MAC.[168]

Table 10-18: CSA R-9 SOI Analysis

Issue	Comments
SOI update recommendation	Retain existing coterminous SOI, on a provisional basis, until the next round of SOI updates in 2015. The Commission should consider a zero SOI and/or dissolution at that time if service levels have not been improved, or a permanent revenue sources has not been established.
Services provided	CSA R-9 provides park facility operation and maintenance.
Present and planned land uses in the area	The district bounds encompass primarily high-density residential areas with single family residences on 6,000 to 10,000 square-foot lots and multifamily residential areas of up to 29 units per acre. There is also retail commercial along San Pablo Dam Road and Appian Way and minimal agricultural, neighborhood business, office space and large lot single family residential uses throughout the CSA.
Projected growth in the District/Recommended SOI	Growth within the CSA's bounds and SOI is projected to continue to be minimal as the area is essentially built-out. Future developments will likely consist of in-fill and minor subdivision projects.

[168] As of March 2010, the County had already been in discussions to take this action.

Present and probable need for public facilities and services in the area	There is a present and probable need for park services. As the area is a built-out community consisting primarily of residences, the demand of park services is anticipated to remain constant in the future.
Opportunity for infill development rather than SOI expansion	An SOI expansion is not recommended at this time.
Service capacity and adequacy	The CSA's existing facility does not have the capacity to serve the entire CSA. The CSA needs an additional 32 acres of neighborhood park to provide adequate park capacity to the area.
Social or economic communities of interest	A community of interest within the CSA is the unincorporated community of El Sobrante.
Effects on other agencies	While retaining the CSA's existing SOI does not directly impact other service providers, the CSA's lack of sufficient facilities promotes the use of facilities owned and operated outside of the CSA in the neighboring cities of Pinole and Richmond.
Potential for consolidations or other reorganizations when boundaries divide communities	There is the potential to consolidate CSA R-9 with RWPRPD; however, given the lack of adequate services provided by the CSA and lack of community interest in CSA activities, consolidation with another District with similar service and community interest challenges is not recommended.
Location of facilities, infrastructure and natural features	The Children's Reading Garden is located on Appian Way towards the center of the CSA. The CSA is abutted by four large regional parks and open space in the south and east.
Willingness to serve	In 2007, the CSA began service to the community through a new facility demonstrating its willingness to serve the area; however, the CSA presently lacks community interest to serve on the advisory committee, which limits the CSA's ability to effectively serve the community.
Potential effects on agricultural and open space lands	The SOI recommendation for the District is not anticipated to directly impact agricultural and open space lands.
Potential environmental impacts	Although no potential environmental impacts were identified in the MSR, the LAFCO counsel and planner should make CEQA determinations.

CSA R-10

CSA R-10 provides operation and maintenance of park and recreation facilities in the unincorporated community of Rodeo.

FORMATION AND BOUNDARY

CSA R-10 was formed on June 24, 1988 as a dependent special district of the County.[169] According to Board of Equalization records, the CSA was dissolved in 1993; however, neither the County Board of Supervisors nor LAFCO have a record of the CSA being dissolved. As the CSA does not receive property tax revenue, it is not necessary for the District to be on the BOE Role for the tax rate area system. No action is required at this time by LAFCO or the County to correct this inconsistency.[170]

The boundary area of the CSA is approximately 7.37 square miles, or approximately 4,717 acres. The SOI for CSA R-10 is coterminous with the boundary of the CSA.

Boundary History

Since formation there have been no changes to the CSA's boundaries.

SERVICE DEMAND AND GROWTH

CSA R-10 lies immediately adjacent to the northeastern boundary of the City of Hercules. The CSA is not within the SOI of a neighboring city.

The area within the CSA is primarily residential with some commercial activity in the northwest corner of the District along Parker Avenue. Business activities within the CSA's bounds include several restaurants, a grocery store, and a few insurance and law offices.

The District considers its customer base to be the residents of the CSA. The estimated population within the CSA is 6,862.[171] The CSA's population density is 931 per square mile, compared with the 2009 countywide density of 1,473. The area has not experienced significant recent growth. Growth in the future is anticipated to be minimal with some in-fill and small subdivision projects. The projected population within the CSA by 2025 is 7,136. This growth is not anticipated to impact service demand in the future.

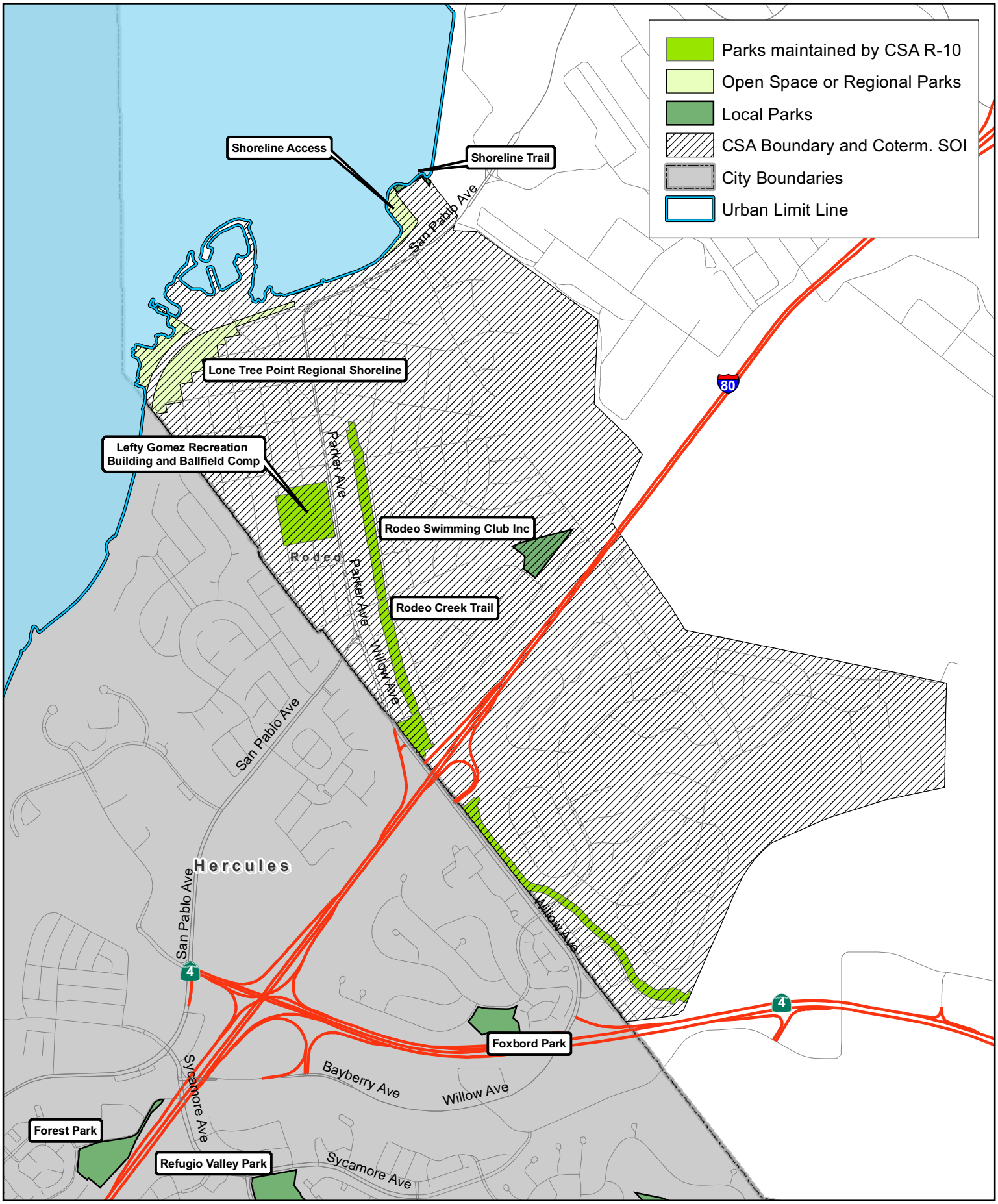
[169] Board of Equalization official date.

[170] Interview with Ralph Davis, Board of Equalization Property and Special Taxes Department, Research Manager, February 23, 2010.

[171] Based on the average household population of 2.7 for unincorporated Contra Costa County in 2009, according to the Department of Finance.

Map 10-10

CSA R-10 and Coterminous Sphere of Influence



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The CSA is a dependent special district of the County, and is not a land use authority. The County is the land use authority, and holds primary responsibility for implementing growth strategies.

FINANCING

With the exception of facility and program fees collected by the CSA, the District has no other fixed revenue sources.[172]

Table 10-19: CSA R-10 Financial Information, FY 08-09

CSA R-10, FY 08-09			
General Financing Approach			
In FY 08-09, parks and recreation services in the CSA were financed by facility rental and recreation fees (97%) and donations (3%). Expenditures consisted primarily of reimbursement to the park maintenance (10%) and community center coordinator contract providers (86%) and payments to the County for administration services (4%).			
Revenues		**Expenditures**	
Total Available Funding	$55,304	Total Operating Expenditures	$39,234
Beginning Fund Balance	$27,884	Administration	$1,432
Total Operating Revenues	$27,420	Facility Maintenance	$4,064
Property Tax	$0	Recreation & Senior Services	$33,738
Park & Recreation Fees[1]	$26,470	Capital Outlays	$0
Donations	$950	Other[3]	$0
Note: (1) Park and recreation fees include fees for recreation services, facility rentals and concessions.			

PARK AND RECREATION SERVICES

Nature and Extent

CSA R-10 provides operation and maintenance of park and recreation facilities and recreation programming in the unincorporated community of Rodeo. All services provided by the CSA are supplied by contract providers, including community center coordination, recreation programming and facility maintenance.

Recreation programming at the Lefty Gomez Recreation Center and ball fields is offered by the Rodeo Baseball Association and private instructors. Classes in the recreation center include sewing, painting for children, jewelry making, and oil painting. In addition, the CSA advisory committee coordinates annual events that are open to the public. In FY 08-09, these events included a pumpkin carving day and a tree lighting event.

[172] CSA R-10 does not receive property taxes or assessments; however, LL-2 Zone 38 receives assessments for landscaping, irrigation, recreational facilities and related improvements in Rodeo. Some expenditures of LL-2 Zone 38 benefit park and recreation facilities within the CSA. Also, the CSA R-10 advisory committee has input through the County Public Works Department in Zone 38 funding.

Location

CSA services are provided to the unincorporated community of Rodeo. The CSA is staffed and served by County Public Works staff, who are responsible for providing services throughout the unincorporated areas of the County. Non-residents may use the CSA's facilities at an additional charge.

Parks and Recreation Facilities

Park and recreation facilities serving the CSA include a recreation center, ball field and a hiking trail.

The Lefty Gomez Recreation Building and Ball Field Complex is owned by the John Swett Unified School District. The CSA provides financing for the operation and maintenance of the center and ball fields. The Rodeo Baseball Association also provides some maintenance of the ball fields as part of its contract with the County for use of the facility. The recreation building and ball field were identified by the County as being in fair condition. Planned improvements to the facility total $3.8 million and include new restrooms, improvement of the flooring and lighting in the recreation center, lights in the outfield, improved access, landscaping, and new fencing, drinking fountains, trash cans and picnic areas. According to the County's Parks CIP these improvements were estimated to be completed in 2010; however, there is presently no financing for these projects.

The Rodeo Creek Trail is owned jointly by the County and the Flood Control District. The County reported that the trail is in fair condition and needs improved landscaping, restrooms, and new trash cans and gates, which would cost approximately $120,000.

CSA R-10 facilities do not have sufficient capacity to meet existing and future demand, according to California and County adopted park-acreage standards and goals. As of 2009, the CSA offered approximately two acres of parkland per 1,000 residents, which fails to meet the California benchmark of three to five acres per 1,000 residents[173] and the County General Plan goal of 2.5 neighborhood acres of park facilities per 1,000 population.[174] In order to meet the General Plan goal, the CSA would need an additional 3.7 acres of parkland.

Park facilities provided by other agencies within 0.5 miles of the CSA include Foxboro Park (3.6 acres) in the City of Hercules.

The CSA practices extensive sharing of the park and recreation facilities serving the area. The Rodeo Creek Trail is jointly owned with the Flood Control District and maintained by the County Lighting and Landscaping District Zone 38. The recreation center and ball field are owned by the John Swett Unified School District, maintained and operated by CSA financing, and recreation programming and additional maintenance is provided by the Rodeo Baseball Association. No additional opportunities for facility sharing were identified by the County.

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[173] For developer park dedication requirements (i.e., "Quimby" fees), California statute (Government Code §66477(a)(2)) sets a benchmark of three to five acres per 1,000 residents

[174] Contra Costa County, *General Plan 2005-2020*, 2005, p. 9-22.

Table 10-20: CSA R-10 Park and Recreation Services

CSA R-10 Park and Recreation Service Adequacy and Facilities						
Service Configuration						
Park Maintenance	By Contract	Recreation Programming			By Contract	
Service Adequacy[1]						
Maintained Park Acres	13.5	Total Park Acres per 1,000[3]			2.0	
Active Parkland	11.0	Active Parkland per 1,000			1.6	
Passive Parkland	2.5	Passive Parkland per 1,000			0.4	
Recreation Attendance[2]	2,660	Recreation Attendance per Resident[4]			0.4	
Recreation Cost per Resident	$4.92	Park Maintenance Cost per Acre[5]			$369	
Recreation Facilities and Parks						
Name	**Location**	**Property Owner**	**Park Type**	**Facilities**	**Condition**	**Acres**
Lefty Gomez Recreation Building and Ballfield Complex	470 Parker Ave., Rodeo	John Swett USD	Active	Community center, two ball fields, two tennis courts, playgroud equipment, picnic and BBQ area	Fair	11.0
Rodeo Creek Trail	Along Rodeo Creek from Mariners Point to Investment Ave	County and Flood Control District	Passive	Benches and picnic tables, ADA accessible	Fair	2.5

Notes:

(1) Active parkland consists of developed parkland with active recreation programming and sports facilities, such as active ball courts (e.g., basketball or tennis), delineated sports fields (e.g., soccer, baseball, softball), aquatic facilities, gymnasiums, etc. Passive parkland consists of developed or undeveloped parkland containing trails, walkways, cultural or scenic resources, open fields, picnic tables/shelter, tot lots, etc., but not containing facilities used for active recreation programming.

(2) Recreation participation levels are tracked through registration forms for classes and head counts at events. Facility rental attendance is based on head counts at events, which consists of approximately 1,440 participants annually.

(3) Acres per 1,000 population based on average household size.

(4) If facility rental recreation attendance were not included, recreation attendance per resident would be approximately 0.1.

(5) Maintenance cost per acre does not include those facilities for which the CSA does not finance maintenance.

CSA R-10 GOVERNANCE ALTERNATIVES

A governance alternative to improve local accountability is to merge the CSA R-10 advisory committee with the Rodeo Municipal Advisory Council (RMAC).[175] Such a governance alternative would improve local accountability and operations as MACs are regulated by adopted County policies, with requirements for meetings, training, operating procedures, and annual reports to the Board of Supervisors. MACs are generally well publicized and have sufficient public interest to retain a full council body.

[175] The process for performing this action would be to (a) disband the CSA Advisory Committee, (b) Amend the RMAC resolution to add parks and recreation services, and (c) apply to LAFCO to activate the latent power to fund the services of a MAC per Government Code §25213(o).

Forming a subsidiary district with the City of Hercules for park and recreation services is not an option because the CSA does not meet land area and registered voter requirements.[176]

CSA R-10 MSR DETERMINATIONS

Growth and population projections

1) The 2009 estimated residential population within the CSA was 6,862. Recent growth has been limited. The projected population within the CSA by 2025 is 7,136.
2) Growth in the future is anticipated to be minimal with some in-fill and small subdivision projects. This growth is not anticipated to impact service demand in the future.

Present and planned capacity of public facilities and adequacy of public services, including infrastructure needs and deficiencies

3) CSA R-10 facilities do not have sufficient capacity to meet existing and future demand, according to California and County adopted park-acreage standards and goals. As of 2009, the CSA offered approximately two acres of parkland per 1,000 residents.
4) An additional 3.7 acres of neighborhood parkland are needed to achieve the County standard of 2.5 acres of neighborhood parkland per 1,000 residents.
5) Park facilities provided by other agencies within 0.5 miles of the CSA include Foxboro Park (3.6 acres) in the City of Hercules.
6) The CSA provides limited recreational programming primarily through private instructors. In order to advertise the classes available to the public, the CSA should consider a website for the recreation facility and programs offered.
7) The recreation building and ball field were identified by the County as being in fair condition. Planned improvements to the facility total $3.8 million and include new restrooms, improvement of the flooring and lighting in the recreation center, lights in the outfield, improved access, landscaping, and new fencing, drinking fountains, trash cans and picnic areas.
8) Service challenges are due to deteriorating infrastructure and a lack of financing for needed improvements.
9) The CSA has an up-to-date capital improvement plan; however, it appears to operate as a complete list of needs rather than a plan of when capital funding will become available for necessary improvements.

[176] To become a subsidiary district of the City of Hercules, CSA R-10 would have to annex at least 70 percent of the land area and registered voters within the City (see Government Code §57105).

Financial ability of agencies to provide services

10) The CSA reports that the current level of financing is not sufficient for adequate service provision. There are significant capital needs which have not been addressed because the current financing level is not adequate to provide services.

Status of, and opportunities for, shared facilities

11) The CSA practices extensive sharing of the park and recreation facilities serving the area. The Rodeo Creek Trail is jointly owned with the Flood Control District and maintained by the County Lighting and Landscaping District Zone 38. The recreation center and ball field are owned by the John Swett Unified School District, maintained and operated by CSA financing, and recreation programming and additional maintenance is provided by the Rodeo Baseball Association.

12) No further opportunities for facility sharing were identified.

Accountability for community service needs, including governmental structure and operational efficiencies

13) The advisory committee acts as a sounding board for the community to voice local preferences to the County.

14) The CSA demonstrated accountability and transparency by disclosing financial and service related information in response to LAFCO requests.

CSA R-10 SOI RECOMMENDATIONS AND DETERMINATIONS

The existing SOI for CSA R-10 is coterminous with its bounds. The SOI for the district was affirmed by LAFCO in 2004.

Agency Proposal

The County did not propose any changes to the CSA's existing SOI.

SOI Options

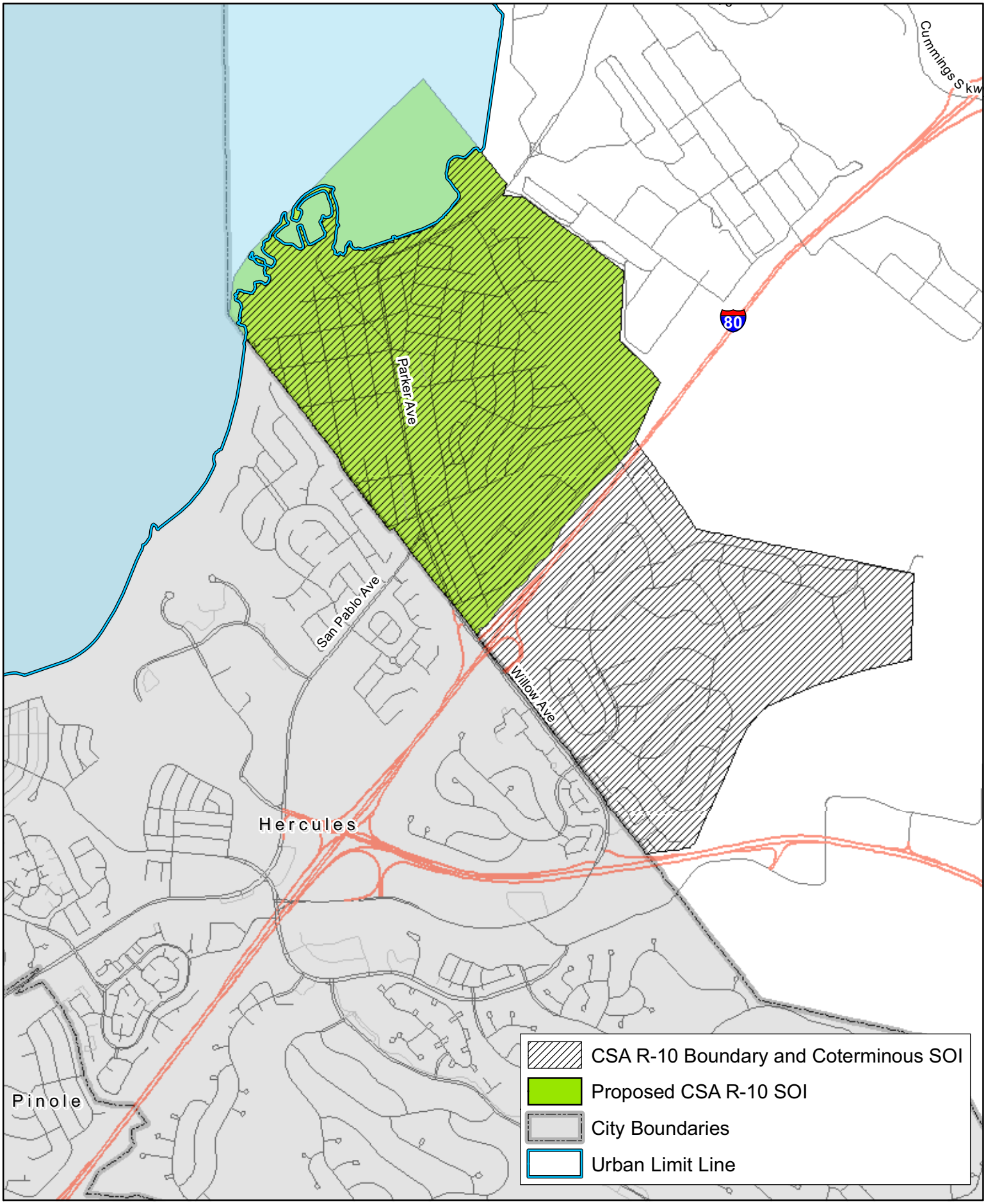
Given the considerations addressed in the MSR, three options were identified for the CSA R-10 SOI:

SOI Option #1 – Retain existing coterminous SOI

If LAFCO determines that the existing government structure is appropriate, then the existing SOI should be retained. This option would enable the district to continue to include the areas within its SOI in its long-term planning.

Map 10-11

CSA R-10 SOI Reduction: Option Two



Map created 3/23/2010
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0 0.125 0.25 0.5 Miles

SOI Option #2 – Reduce SOI to match the Rodeo Redevelopment Area

The Rodeo Redevelopment Area is nearly contiguous with the portion of the CSA R-10 boundary area northwest of I-80. Such an SOI would be appropriate if LAFCO determines that the logical future service area of CSA R-10 does not include homeowners southeast of I-80; however, this does not appear to be the case, as the Lefty Gomez Recreation Building and Ballpark are the only active parkland facilities in the area, and currently serve all CSA R-10 residents.

SOI Option #3 – Zero SOI

Adopting a zero SOI would signify that LAFCO anticipates that the district will eventually be dissolved and its functions provided by the John Swett Unified School District. John Swett USD is the owner of the only significant public park and recreation facility within the CSA (Lefty Gomez Park). Revenues from the Rodeo Baseball Association could be passed on to the school district, and existing maintenance and recreation contracts would have to be transferred to the school district from the County. Such an SOI option would be logical if LAFCO determined that CSA R-10 was not an appropriate local agency and service provider, given that there are no property taxes or assessments associated with the CSA.

Recommendation

The recommended SOI for CSA R-10 is to retain its existing coterminous SOI. The CSA has a steady revenue source and continues to provide park and recreation services; although, capacity of the facilities is presently inadequate. The area is built-out and no change in demand for park services is anticipated within the CSA and adjacent to the CSA, consequently no changes to the existing SOI are necessary or recommended.

An SOI reduction to match the Rodeo Redevelopment Area is not recommended because the CSA serves all existing CSA residents, and reducing the SOI would exclude homeowners southeast of I-80 that participate in park and recreation programs at the Lefty Gomez Park. It is recommended, however, that the CSA R-10 advisory committee work with the redevelopment agency to plan potential recreation amenities and services in conjunction with the redevelopment of the Rodeo waterfront area.

In order to enhance local accountability, the County Board of Supervisors may wish to consider merging the CSA R-10 advisory committee with the Rodeo MAC.

Table 10-21: CSA R-10 SOI Analysis

Issue	Comments
SOI update recommendation	Retain existing coterminous SOI.
Services provided	CSA R-10 provides operation and maintenance of park and recreation facilities and recreation programming in the unincorporated community of Rodeo. All services provided by the CSA are supplied by contract providers, including community center coordination, recreation programming and facility maintenance.
Present and planned land uses in the area	The area within the CSA is primarily residential with some commercial activity in the northwest corner of the District along Parker Avenue. Business activities within the CSA's bounds include several restaurants, a

	grocery store, and a few insurance and law offices.
Projected growth in the District/Recommended SOI	Growth in the future is anticipated to be minimal with some in-fill and small subdivision projects. This growth is not anticipated to impact service demand in the future.
Present and probable need for public facilities and services in the area	There is a present and probable need for park services. As the area is a built-out community consisting primarily of residences, the demand of park services is anticipated to remain constant in the future.
Opportunity for infill development rather than SOI expansion	An SOI expansion is not recommended at this time.
Service capacity and adequacy	CSA R-10 facilities do not have sufficient capacity to meet existing and future demand, according to California and County adopted park-acreage standards and goals. An additional 3.7 acres of neighborhood parkland are needed to meet the County neighborhood parkland standard of 2.5 acres per 1,000 population.
Social or economic communities of interest	A community of interest within the CSA is the unincorporated community of Rodeo.
Effects on other agencies	While retaining the CSA's existing SOI does not directly impact other service providers, the CSA's lack of sufficient facilities promotes the use of facilities owned and operated outside of the CSA in the neighboring City of Hercules.
Potential for consolidations or other reorganizations when boundaries divide communities	Presently, consolidation is not necessary or feasible, as the CSA's boundaries do not appear to divide a community and there is a lack of districts to consolidate with the CSA.
Location of facilities, infrastructure and natural features	The CSA's two park facilities are located within the CSA's boundaries. The community center and baseball fields are located on Parker Avenue toward the western boundary of the District. The trail runs along Rodeo Creek from Mariners Point to Investment Avenue.
Willingness to serve	The CSA presently serves the area and is willing to continue to serve all areas within its boundaries.
Potential effects on agricultural and open space lands	The SOI recommendation for the District is not anticipated to directly impact agricultural and open space lands.
Potential environmental impacts	Although no potential environmental impacts were identified in the MSR, the LAFCO counsel and planner should make CEQA determinations.

CITY-ADMINISTERED CSAS

In the case of CSAs M-29, M-30 and R-4, assessments or taxes are levied by the County and passed on to the respective city or town for use on specified services. Funds levied within CSAs M-29 and M-30 may be used for multiple services, including road maintenance, street landscaping, park maintenance, open space maintenance, flood control, police services, and community facilities maintenance. Funds received for CSA R-4 may only be used for park and recreation services.

CSAs M-29 and M-30 were created to ensure that new development, adjacent to the City of San Ramon and the Town of Danville, was financing any increase in demand for services, and in the case of CSA M-29, to ease the transition from County governance to the City.[177] CSA R-4 was created prior to the incorporation of the Town of Moraga to finance enhanced park and recreation services. When the Town incorporated, the County agreed to provide the CSA funding to the Town for enhanced park and recreation services.

CSA M-29

CSA M-29 provides financing for facilities and services in the Dougherty Valley area, a portion of which lies within the boundaries of the City of San Ramon. City services that are eligible to receive CSA M-29 funds include internal road maintenance, street landscaping, park maintenance, open space maintenance, flood control, police services, community facilities maintenance, and city administration overhead charge.[178]

FORMATION AND BOUNDARY

CSA M-29 was formed on July 9, 1996 as a dependent special district of the County.[179] The CSA was formed as part of an agreement to settle litigation brought against the County and the developers in Dougherty Valley (Shapell and Windemere) and to enable the County to finance extended public services for the Dougherty Valley residents and property owners at no extra cost to the County's general fund and the taxpayers outside of Dougherty Valley.[180]

The boundary area of the CSA is approximately 9.34 square miles, or 5,978 acres. The Dougherty Valley area consists of land located to the east of the City of San Ramon and includes the area north to Lawrence Road on both sides of Dougherty Road from the county line in the south to the Shapell property line in the west and the Tassajara Valley Ridge in the east. Upon LAFCO's

[177] Interview with Susan Cohen, Contra Costa County Special Districts Coordinator, November 17, 2009.

[178] CSA M-29 Reimbursement Agreement, December 20, 2005, p. 7.

[179] Board of Equalization official date.

[180] Article III of Settlement Agreement in *Town of Danville, et al. v. County of Contra Costa et al.*, May 11, 1994.

suggestion, the Camp Parks Reserve Forces Training Area was included within the CSA's boundaries.[181] LAFCO affirmed a coterminous SOI for CSA M-29 in 2004.[182]

Presently, the CSA encompasses both incorporated (68 percent) and unincorporated (32 percent) areas. The City of San Ramon has completed 11 annexations of territory in the Dougherty Valley area. The annexed territory was not removed from the CSA in accordance with the District's formation resolution, which waives the application of Government Code §25210.90 so that annexed property may remain within the CSA.[183] The remaining unincorporated portion of the CSA lies within the City's SOI, and the City did not report when it anticipates annexing the remaining unincorporated area. According to the CSA reimbursement agreement, it appears that the County and City anticipate the CSA will remain in existence to continue financing of services in the area after annexation to the City and build-out of the Dougherty Valley area.[184]

Boundary History

Since formation, there have been no changes to the District's boundaries.

ACCOUNTABILITY AND GOVERNANCE

CSA M-29 is a dependent special district of Contra Costa County, and is governed by the County Board of Supervisors. Benefit assessments and property tax are levied by the County and passed on to the City of San Ramon for road maintenance, street landscaping, park maintenance, open space maintenance, flood control, police services, community facilities maintenance, and city administration overhead charge.

CSA M-29 funds are administered by the Finance Division of the City Administrative Services Department, for the City of San Ramon. CSA M-29 funds for park and recreation facility maintenance are managed by the Director of the Public Services Department, who reports to the City Manager. There is also a Parks and Community Services Commission that advises the City Council regarding matters related to park and recreation services. The Commission is comprised of seven members and a student commissioner—all residents of the City of San Ramon. Individuals from the unincorporated portion of the CSA may not sit on the Commission.

The City conducts community outreach for park and recreation purposes through the Parks and Community Services Department, the Parks and Community Services Commission and advisory committees comprised of San Ramon residents. The Department and Commission both perform outreach primarily through their websites with facility, program and meeting information.

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[181] LAFCO, Executive Officer's Report, Agenda Item 7a, February 7, 1996.

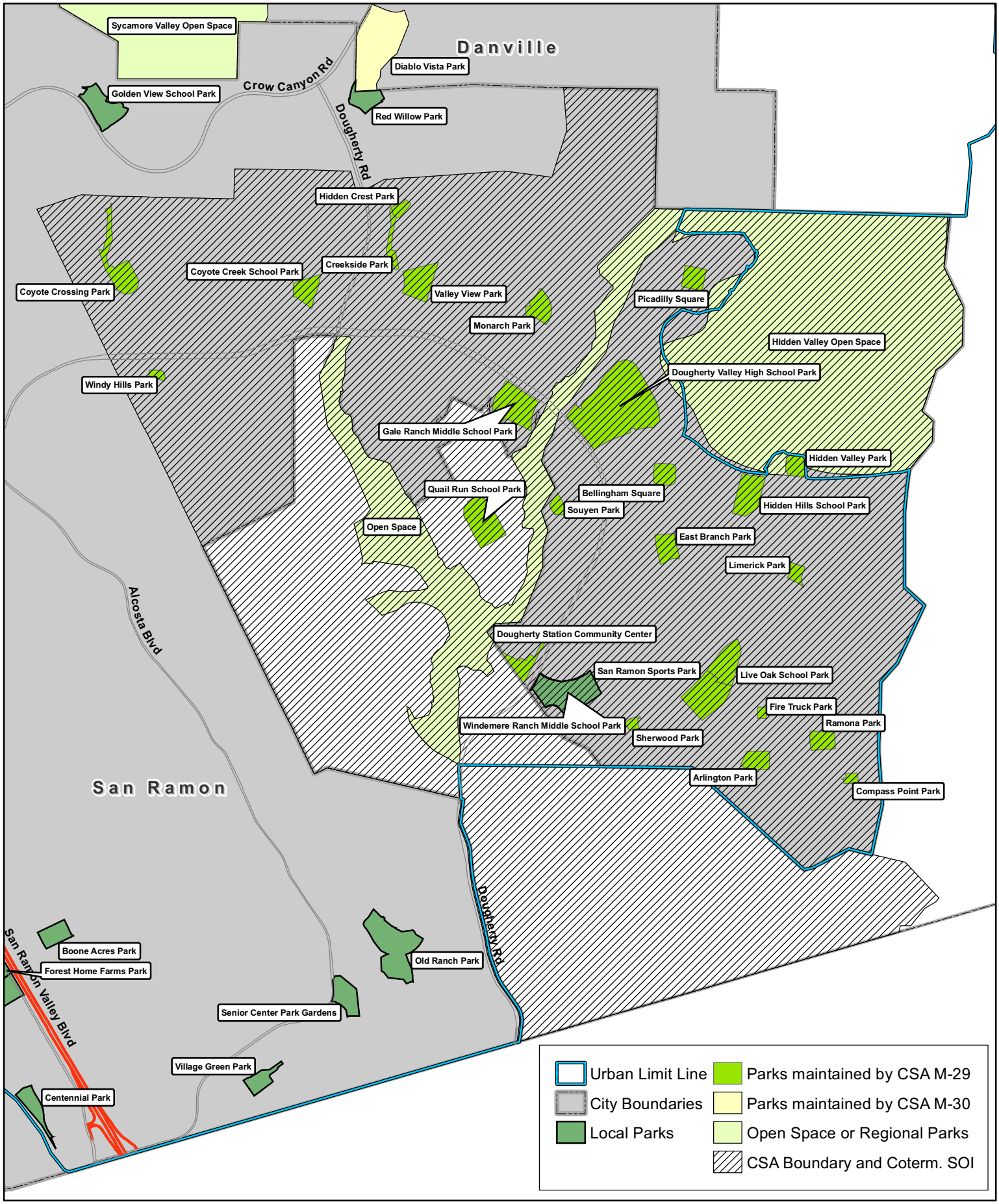
[182] LAFCO, Meeting Minutes, February 11, 2004, p. 11.

[183] LAFCO Resolutions 98-33, 99-35, 01-20, 03-26, 03-27, 03-28, 04-15, 05-11, 06-11, 07-14, 08-23.

[184] CSA M-29 Reimbursement Agreement, December 20, 2005, p. 12.

Map 10-12

CSA M-29 and Coterminous Sphere of Influence



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Miles
0 0.25 0.5 1

Complaints may be submitted through the customer service response management system on the City's website, phone calls, email, letters and in person to any member of the Parks and Community Services staff, the Public Services Department, the office of the City Manager, the Parks and Community Services Commission, or City Council. Complaints logged on the customer service response management system are generally resolved within seven to 10 days. Once an issue is resolved and a resolution email is sent to the customer. Of those customers that responded to survey after resolution of a complaint, at least 90 percent reported that they had a favorable experience. Complaints regarding park and recreation services most often relate to procedural disagreements between, such as refunds for program fees, or maintenance requirements at a park facility. The City did not provide an estimate of the number of complaints received in regarding park and recreation services in 2008.

The City demonstrated accountability in its disclosure of information and cooperation with LAFCO. The City responded to LAFCO's written questionnaires and cooperated with LAFCO map inquiries and document requests regarding CSA M-29.

MANAGEMENT

The City of San Ramon runs a full-service parks and recreation department with a staffing level of 33.6 FTE, and a Public Services Department that oversees infrastructure maintenance with 77.9 FTE. Approximately 4.5 FTE in the Public Services Department are dedicated to facility maintenance in Dougherty Valley, and 11 FTE are dedicated to park maintenance.

Performance of regular full-time employees is reviewed annually by the department heads. Mid-year reviews are encouraged but not required. Probationary evaluations are completed after six months on employees in new positions. Workload monitoring of the departments is tracked annually through the budget and through monthly expenditure reports. In addition, maintenance requests generated by citizens and supervisors are tracked through weekly task sheets. The City does not conduct regular benchmarking through formal comparison of park facilities with other providers; however, the City has completed a Park Master Plan that analyzes park and recreation facility needs and park acreage service levels. In addition, department-wide performance is reviewed in the annual budget.

The City of San Ramon prepared a Parks and Recreation Master Plan in 2008 and also includes a park and recreation element in the City's General Plan (2002). Other plans regarding park and recreation services adopted by the City include the Park Maintenance 10 Year Capital Funding Plan, the Building Maintenance and Capital Funding Plan, and the Parks and Community Services Strategic Plan. In addition, the Public Services Department has completed a facility maintenance plan and a park maintenance plan. The City annually prepares audited financial statements—CSA financing is tracked separately in the financial statement through the Dougherty Valley fund. The City's park and recreation services were reviewed as part of the Central County Sub-regional MSR (September 2009).

SERVICE DEMAND AND GROWTH

The CSA's boundaries are coterminous with the Dougherty Valley Specific Plan Area. When complete, the master planned community will be predominately residential and include up to 4,982 single family medium- and high-density homes, 6,018 multi-family low- and high-density units,[185] 330,000 square feet of commercial property, a golf course, a library, a community center, a senior center, a fire station, a police substation, a city public services center, seven schools, a childcare facility, a community college, a performing arts facility, 175 acres of developed park space, and 2,093 acres of unimproved open space.[186]

The City considers the District's customer base to be the residents within the CSA. According to City population estimates for the CSA, in FY 09-10, there are approximately 7,833 housing units and about 21,598 residents.[187] The CSA's population density is 2,312 per square mile, compared with the 2009 countywide density of 1,473.

The area has experienced significant recent growth, and it is anticipated that the area will continue to experience a strong rate of growth until the Dougherty Valley Specific Plan Area is built-out. Between 2002 and 2009, the estimated population of the entire CSA has grown by over 500 percent, from 3,366 to 21,598.[188] The specific plan area at build-out will have approximately 11,000 dwelling units with an estimated new residential population of 29,040. As of the end of 2009, the development was approximately 74 percent complete.[189]

The CSA is a dependent special district of the County, and is not a land use authority. The County is the land use authority in the unincorporated area, while the City of San Ramon is the land use authority within the city limits. These agencies hold primary responsibility for implementing growth strategies. In regard to the Dougherty Valley Specific Plan Area, permits for building in the unincorporated portion of the valley are processed by Contra Costa County, and after the home is occupied, the City processes all subsequent permitting.[190] Prior to the County issuing building permits in the plan area, the City's Architectural Review Board reviewed the designs to ensure that they met all city design standards. Long-range planning was completed in cooperation by both of the agencies through the Dougherty Valley Specific Plan. The City began the process by identifying issues and opportunities in reports and forming a citizen steering committee to formulate basic plan concepts. The County then used the plan concepts to prepare the specific plan document.[191]

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[185] Contra Costa County, *Dougherty Valley Specific Plan*, 2005, p. 4-6.

[186] City of San Ramon, *Dougherty Valley Information*, July 2005.

[187] Based on CSA population estimate calculation as determined by the CSA M-29 Reimbursement Agreement, which assumes an average of 2.8 persons per single-family and multi-family household. Projected units for FY 09-10 were discounted by 50 percent to account for mid-year move-ins.

[188] City of San Ramon, CSA M-29 Invoices to Contra Costa County, December 1, 2005 to November 23, 2009.

[189] Estimate based on ratio of budgeted population in FY 09-10 by City of San Ramon for the entire CSA and the total projected population at build-out of the specific plan.

[190] City of San Ramon, *Dougherty Valley Information*, July 2005, p. 3.

[191] Contra Costa County, *Dougherty Valley Specific Plan*, 2005, p. 2-1.

FINANCING

The City tracks all revenue and expenditures for CSA M-29 through the Dougherty Valley Fund. According to agreements with the County and the developers, the City is required to separately budget for and track expenditures for services provided in the Dougherty Valley area. The County collects benefit assessments and property taxes levied on the properties in the CSA and passes these funds to the City based on the City's budget for the area as reported to the County. The City supplements the fund with sales tax, fines and forfeitures, licenses, permits and franchise fees, and motor vehicle in-lieu fees from the general fund. Landowners within the CSA pay an annual benefit assessment to the CSA based on land use. In FY 09-10, the annual benefit assessment on each single family dwelling unit was $1,138.02 and $806.98 on each multi-family unit. The assessment is adjusted annually according to the Consumer Price Index.

Table 10-22: CSA M-29 Financial Information, FY 08-09

CSA M-29, FY 08-09			
General Financing Approach			
In FY 08-09, services in the CSA were financed primarily by benefit assessments (67%) and program and property taxes (18%). Park and community facility maintenance comprised 25 percent of expenditures for the Dougherty Valley Fund.			
CSA M-29 Fund managed by Contra Costa County			
Revenues		**Expenditures**	
Total Available Funding	$16,383,855	Total Operating Expenditures	$6,518,869
Beginning Fund Balance	$6,534,023	Administration	$11,463
Total Operating Revenues	$9,849,832	Transfers to City	$6,295,118
Property Tax	$2,038,736	Expenditure Transfers	$212,289
Park & Recreation Fees[1]	$0		
Other/General Fund[2]	$57,611		
Special Tax & Assessments	$7,733,291		
Intergovernmental/Grants	$20,194		
Dougherty Valley Fund managed by the City of San Ramon			
Revenues		**Expenditures**	
Total Operating Revenues	$13,807,087	Total Operating Expenditures	$13,808,188
Transfers from County[3]	$11,793,239	Administration	$1,368,379
Real Property Transfer Taxes	$261,869	Facility Maintenance[4]	$3,519,146
Sales Tax	$960,220	Open Space Maintenance	$56,051
Fines and Forfeitures	$146,665	Road Maintenance	$1,026,555
Licenses/Permits/Franchise Fees	$340,226	Landscaping	$2,407,529
Motor Vehicle In-Lieu Fees	$304,868	Flood Control Services	$88,829
		Police Services	$5,341,699

Notes:

(1) Park and recreation fees include fees for recreation services, facility rentals and concessions.

(2) Other and general fund sources include sources other than those listed separately.

(3) Transfers from the County includes funds for FY 08-09 expenditures which were not received until FY 09-10.

(4) Facility maintenance expenditures for park and community facilities

The City reported that the current financing level is generally not adequate to provide services to the CSA, as the number of units sold and paying assessments to the CSA have not kept up with the costs of providing services, as a result of the recent economic decline. The City reported that it has been using general fund revenue to make up the funding shortfall and maintain adequate service levels. Upon build-out of the CSA, the City estimated that there will be approximately $3 million in additional CSA funding available, which is anticipated to be sufficient to fund services in the CSA. In addition, financial challenges faced by the City have been magnified, since the County has been slow to reimburse the City for funds that were paid in advance to provide services to the area.[192]

PARK AND RECREATION SERVICES

Nature and Extent

CSA M-29 provides financing for park and recreation facility maintenance. While the City does provide recreation programming, these services are not relevant to CSA M-29 as it only finances maintenance of the park and recreation facilities. Maintenance of city-owned facilities is provided directly by the City. Maintenance of park and active field areas at joint-use school facilities is provided by the City using CSA funds.

Location

CSA funded services are provided to the area within the CSA's boundaries, only within the City's boundaries. The City takes over maintenance of park facilities as the facilities are accepted into the public system and the area is annexed into the City. The CSA is staffed and served by the City of San Ramon staff, who are responsible for providing services throughout the City. Non-residents of the City and CSA may use the park and recreation facilities and programs for a higher fee than residents.

Parks and Recreation Facilities

Parks and recreation facilities serving the CSA include 26 city-owned parks consisting of a total of 136 developed park acres and seven district-owned school parks with 66 acres of developed park land. In addition to the parks, there is a community center, an aquatic center, and a performing arts center. All of the facilities were constructed between 2000 and 2009 and were reported to be in excellent condition by the City.

Given that all facilities within the CSA were constructed and opened recently, there are limited needs and deficiencies presently; however, as the facilities age in the next 10 to 15 years, there will be a need for facility rehabilitation. The City has begun maintenance and renovation planning to address these anticipated future capital needs.

The City anticipates that the developers will complete construction and transfer an additional eight park sites to the City by 2018, including a 30-acre community park.[193] The total acreage of all eight park facilities was not provided by the City.

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[192] Correspondence with Karen McNamara, Director of the Public Services Department, City of San Ramon, February 1, 2010.

[193] City of San Ramon, *Park Master Plan*, 2008, p. 10.

While the total acreage of existing park facilities exceed City parkland standards, the CSA lacks sufficient neighborhood parkland to meet City standards. According to the Dougherty Valley Specific Plan, at build-out, the area will meet City parkland standards and will have sufficient capacity to serve all residents of the CSA. The City's current standard for functional public parkland is 6.5 acres per 1,000 residents, comprising 4.5 acres of neighborhood parks (those serving residents living within a 1/2-mile radius) and 2 acres of community parks (those serving residents within a 3-mile radius).[194] As of 2009, there was approximately 3.5 acres of city-owned and school neighborhood parkland per 1,000 residents in the CSA, and 3 acres of city-owned and school community parkland per 1,000 residents. While the CSA exceeds the City's community parkland standard, it lacks sufficient neighborhood parkland to meet the City's standard. In order to meet the City's neighborhood parkland standard, the CSA would need an additional 22.5 acres of neighborhood parkland. At build-out of the valley, the specific plan outlines plans for at least 6.4 acres and up to 9.8 acres of parkland (including school facilities) per 1,000 residents.[195]

The City presently practices facility sharing and collaboration with the San Ramon Valley Unified School District (SRVUSD). Since 1987, the City has had a joint-use agreement with SRVUSD for joint use of facilities at every school site in San Ramon, in conjunction with the City's recreation and park programs. The City provides maintenance of the park and sport fields and provides recreation programming at the schools, and in return the school properties are open for public use after school hours. No additional opportunities for facility sharing within the CSA's boundaries were identified by the City.

[194] Ibid, p. 56.

[195] Contra Costa County, Dougherty Valley Specific Plan, 2005, p. 8-2.

Table 10-23: CSA M-29 Park and Recreation Services

CSA M-29 Park and Recreation Service Adequacy and Facilities						
Service Configuration						
Park Maintenance	City of San Ramon	Recreation Programming			City of San Ramon	
Service Adequacy[1]						
Maintained Park Acres	145.9	Total Park Acres per 1,000[2]			6.8	
Active Parkland	51.7	Active Parkland per 1,000			2.4	
Passive Parkland	94.2	Passive Parkland per 1,000			4.4	
Park Maintenance Cost per Acre	$15,924					
Recreation Facilities and Parks						
Name	**Location**	**Property Owner**	**Park Type**	**Facilities**	**Condition**	**Acres**
Arlington Park	3735 Knightsbridge Way	City of San Ramon	Passive	Multi-use sports fields, children's maze	Excellent	4.1
Bellingham Square	Bellingham Way	City of San Ramon	Passive	Sand volleyball courts	Excellent	4.0
Compass Point Park	545 Balmoral Ct.	City of San Ramon	Passive	Open play lawn	Excellent	1.4
Coyote Creek School Park	8700 N. Gale Ridge Dr.	SRVUSD	Active	Multi-use sports fields	Excellent	6.0
Coyote Crossing Park	3495 Rosincress Dr.	City of San Ramon	Passive	Multi-use sports fields, basketball courts, tennis courts	Excellent	7.9
Creekside Park	1342 S. Wedgewood Rd.	City of San Ramon	Passive	Soccer fields, basketball courts	Excellent	6.0
Dougherty Station Community Center	17011 Bollinger Canyon Rd.	City of San Ramon	Active		Excellent	-
Dougherty Valley Aquatic Center	10550 Albion Rd.	City of San Ramon	Active	Aquatic center	Excellent	-
Dougherty Valley High School Park	10550 Albion Rd.	SRVUSD	Active	Baseball fields, multi-use sports fields	Excellent	17.0
Dougherty Valley Performing Arts Center	10550 Albion Rd.	City of San Ramon	Passive	Performing arts center	Excellent	-
East Branch Park	Harcourt Dr.	City of San Ramon	Passive	Multi-use sports fields, basketball courts	Excellent	5.1
Fire Truck Park	2070 Arlington Way	City of San Ramon	Passive	Open play lawn	Excellent	1.2
Gale Ranch Middle School Park	6400 Main Branch Rd.	SRVUSD	Passive	Multi-use sports fields	Excellent	15.0
Hidden Crest Park	Asterbell Dr.	City of San Ramon	Passive	Open play lawn, gazebo	Excellent	2.3
Hidden Hills School Park	12995 Harcourt Rd.	SRVUSD	Active	Multi-use sports fields	Excellent	6.3
Hidden Valley Park	Albion Rd.	City of San Ramon	Passive	Baseball fields, multi-use sports fields	Excellent	4.5
Limerick Park	Bethany Rd.	City of San Ramon	Passive	Basketball courts	Excellent	2.8
Live Oak School Park	5151 Sherwood Way	SRVUSD	Active	Multi-use sports fields	Excellent	5.0
Monarch Park	8502 N. Monarch Rd.	City of San Ramon	Passive	Multi-use sports fields, cricket field	Excellent	6.3

continued

Recreation Facilities and Parks Name	Location	Property Owner	Park Type	Facilities	Condition	Acres
Picadilly Square	2503 Picadilly Circle	City of San Ramon	Passive	Picnic areas	Excellent	4.1
Quail Run School Park	400 Goldenbay Ave.	SRVUSD	Active	Multi-use sports fields	Excellent	4.0
Ramona Park	6330 Murdock Way	City of San Ramon	Passive	Open play area, horseshoes, bocce ball courts	Excellent	4.0
San Ramon Sports Park	5261 Sherwood Way	City of San Ramon	Active	Multi-use sports fields, basketball courts, all-weather soccer field	Excellent	11.0
Sherwood Park	Sherwood Way & Chancery Way	City of San Ramon	Passive	Open play lawn, gazebo	Excellent	1.5
Souyen Park	Albion Rd.	City of San Ramon	Active	Tennis courts, bocce ball courts, climbing wall	Excellent	2.4
Valley View Park	Monarch Rd. & Star Jasmine Dr.	City of San Ramon	Passive	Baseball fields, multi-use sports fields, tennis courts	Excellent	10.3
Windemere Ranch Middle School Park	11611 East Branch Pkwy	SRVUSD	Passive	Multi-use sports fields	Excellent	12.4
Windy Hills Park	Ustilago Dr.	City of San Ramon	Passive	Picnic areas	Excellent	1.4

Notes:
(1) Active parkland consists of developed parkland with active recreation programming and sports facilities, such as active ball courts (e.g., basketball or tennis), delineated sports fields (e.g., soccer, baseball, softball), aquatic facilities, gymnasiums, etc. Passive parkland consists of developed or undeveloped parkland containing trails, walkways, cultural or scenic resources, open fields, picnic tables/shelter, tot lots, etc., but not containing facilities used for active recreation programming.
(2) Acres per 1,000 population based on average household size.

CSA M-29 GOVERNANCE ALTERNATIVES

As the CSA is presently active and portions of the CSA are unincorporated, no governance alternatives were identified at this time. Once the area has been built-out and the territory within the CSA has been entirely annexed by the City, it is recommended that the City and County collaborate to find a more efficient manner for the City to continue to receive financing for these services. One possibility may be the establishment of a subsidiary assessment district within the City of San Ramon.

CSA M-29 MSR DETERMINATIONS

Growth and population projections

1) The 2009 population within the district was about 21,598 residents. The area has experience significant recent growth. Between 2002 and 2009, the estimated population of the entire CSA has grown by over 500 percent, from 3,366 to 21,598.

2) It is anticipated that the area will continue to experience a strong rate of growth until the Dougherty Valley Specific Plan Area is built-out. The specific plan area at build-out will have approximately 11,000 dwelling units with an estimated new residential population of 29,040. As of the end of 2009, the development was approximately 74 percent complete.

Present and planned capacity of public facilities and adequacy of public services, including infrastructure needs and deficiencies

3) As of 2009, there was approximately 3.5 acres of city-owned and school neighborhood parkland per 1,000 residents in the CSA, and 3 acres of city-owned and school community parkland per 1,000 residents.

4) While the total acreage of existing park facilities and community parks exceed City parkland standards, the CSA lacks sufficient neighborhood parkland to meet the City standard of 4.5 neighborhood park acres per 1,000 residents. In order to meet the City's neighborhood parkland standard, the CSA would need an additional 22.5 acres of neighborhood parkland.

5) At build-out of the valley, the specific plan outlines plans for at least 6.4 acres and up to 9.8 acres of parkland (including school facilities) per 1,000 residents.

6) The CSA's facilities have all been built since 2000 and are in excellent condition. No major needs or deficiencies were identified for the park and recreation facilities by the City.

Financial ability of agencies to provide services

7) The City reported that the current financing level is generally not adequate to provide services to the CSA, as the number of units sold and paying assessments to the CSA have not kept up with the costs of providing services, as a result of the recent economic decline. As a result, the City has had to use general funds to finance services in the area.

8) Financial challenges faced by the City have been magnified, as the County has been slow to reimburse the City for funds that were paid in advance to provide services to the area. It is recommended that the County and City work to ensure timely reimbursement.

9) Significant capital financing will be required as park facilities age and require rehabilitation. The City has begun planning for these capital financing needs.

Status of, and opportunities for, shared facilities

10) The City presently practices facility sharing and collaboration with the San Ramon Valley Unified School District (SRVUSD) at every school site in San Ramon.

11) No additional opportunities for facility sharing within the CSA's boundaries were identified by the City.

Accountability for community service needs, including governmental structure and operational efficiencies

12) Accountability to local voters is constrained as the CSA does not have an advisory committee to act as a sounding board for the community to voice local preferences to the County or the City. In addition, CSA residents are not eligible to sit on the Park and Community Services Commission.

13) The City should consider allowing CSA residents to the sit on the Park and Community Services Commission to enhance accountability.

14) The CSA and City demonstrated accountability and transparency by disclosing financial and service related information in response to LAFCO requests.

CSA M-29 SOI RECOMMENDATIONS AND DETERMINATIONS

The existing SOI for CSA M-29 is coterminous with its bounds. The SOI for the district was affirmed by LAFCO in 2004.

Agency Proposal

No changes to the CSA's SOI were proposed by the County or the City.

SOI Options

Given the considerations addressed in the MSR, one option is identified for the CSA M-29 SOI:

SOI Option #1 – Retain existing coterminous SOI

If LAFCO determines that the existing government structure is appropriate, then the existing SOI should be retained. This option would enable the district to continue to include the areas within its SOI in its long-term planning.

Recommendation

The recommended SOI for CSA M-29 is to retain its existing coterminous SOI. The CSA has a steady revenue source to finance services through the City, and is an integral part to ensuring continued service in the future for the Dougherty Valley development. The City plans to eventually annex the entire CSA territory through a phased annexation plan. Once the area has been built-out and the territory within the CSA has been entirely annexed by the City, it is recommended that the City and County collaborate to find a more efficient manner for the City to continue to receive financing for these services. One possibility may be the establishment of a subsidiary assessment district within the City of San Ramon.

Table 10-24: CSA R-M-29 SOI Analysis

Issue	Comments
SOI update recommendation	Retain existing coterminous SOI.
Services provided	CSA M-29 provides financing for park and recreation facility maintenance. Maintenance of city-owned facilities is provided directly by the City. Maintenance of park and active field areas at joint-use school facilities is provided by the City using CSA funds.
Present and planned land uses in the area	The CSA's boundaries are coterminous with the Dougherty Valley Specific Plan Area. When complete, the master planned community will be predominately residential and include up to 4,982 single family medium- and high-density homes, 6,018 multi-family low- and high-density units, 330,000 square feet of commercial property, a golf course, a library, a community center, a senior center, a fire station, a police substation, a city public services center, seven schools, a childcare facility, a community college, a performing arts facility, 175 acres of developed park space, and

	2,093 acres of unimproved open space.
Projected growth in the District/Recommended SOI	The area has experienced significant recent growth, and it is anticipated that the area will continue to experience a strong rate of growth until the Dougherty Valley Specific Plan Area is built-out.
Present and probable need for public facilities and services in the area	There is a present and probable need for park services. As the area continues to grow, the demand of park services is anticipated to increase in the future.
Opportunity for infill development rather than SOI expansion	An SOI expansion is not recommended at this time.
Service capacity and adequacy	While the total acreage of existing park facilities and community parks exceed City parkland standards, the CSA lacks sufficient neighborhood parkland to meet the City standard of 4.5 neighborhood park acres per 1,000 residents. At build-out of the valley, the specific plan outlines plans for at least 6.4 acres and up to 9.8 acres of parkland (including school facilities) per 1,000 residents.
Social or economic communities of interest	Social communities of interest within the CSA include the several residential subdivisions in the newly developed area. Economic communities of interest include the two developers of the valley, Shapell and Windemere and the landowners within the CSA that pay benefit assessments to the District.
Effects on other agencies	Retaining the CSA's existing coterminous SOI is not anticipated to directly impact other agencies.
Potential for consolidations or other reorganizations when boundaries divide communities	Presently, consolidation is not necessary or feasible, as the CSA's boundaries do not appear to divide a community and there is a lack of districts to consolidate with the CSA.
Location of facilities, infrastructure and natural features	Facilities that serve the CSA are within the incorporated portion of the CSA. No significant natural features were identified within the CSA's bounds.
Willingness to serve	The CSA and the City presently serve the area, and both are willing to continue to serve all areas within their boundaries.
Potential effects on agricultural and open space lands	The SOI recommendation for the District is not anticipated to directly impact agricultural and open space lands.
Potential environmental impacts	Although no potential environmental impacts were identified in the MSR, the LAFCO counsel and planner should make CEQA determinations.

CSA M-30

CSA M-30 provides financing for extended facilities and services in the unincorporated community of Alamo Springs through the Town of Danville and CSA L-100. A portion of CSA M-30 funds are transferred to CSA L-100 for street light services. Town services that are eligible to receive CSA M-30 funds include parks and recreation, law enforcement, street maintenance, and landscaping. Law enforcement services are provided by contract with the County Sheriff to the Town and the CSA. While there are no public streets for the Town to maintain within the CSA, the Town maintains public roads and landscaping on those roads leading to the CSA. The same is true for park and recreation services—there are no park facilities within the CSA; however, the Town uses CSA funds to provide park and recreation services within town limits for CSA resident use. The Danville Street Lighting and Landscape Assessment District (LLAD) 1983-1, a subsidiary district to the Town, provides maintenance for parks (Zone D) and roadside landscaping (Zone A).

FORMATION AND BOUNDARY

CSA M-30 was formed on December 30, 1997 as a dependent special district of the County.[196] The CSA was formed per a Memorandum of Understanding between the County and the Town of Danville pertaining to the planning for Subdivision 7452 in Alamo Springs and services to the development.[197] Per the agreement, the CSA collects benefit assessment revenue and transfers funds to the town and CSA L-100 to provide services to the residents of the CSA. The Town is the logical service provider in the subdivision as the area is only accessible via La Gonda Way through the Town. The subdivision is partially within the town limits (12 lots) and partially within unincorporated Contra Costa County (41 lots). The territory within the CSA's bounds includes only the portion of the subdivision that is unincorporated and is located adjacent to the Town of Danville. According to the agreement between the Town and the County, the area is to remain unincorporated.[198]

The boundary area of the CSA is approximately 0.23 square miles, or approximately 147 acres.[199] The SOI for CSA M-30 is coterminous with the boundary of the CSA.

Boundary History

No changes to the CSA boundary have occurred since formation in 1997.

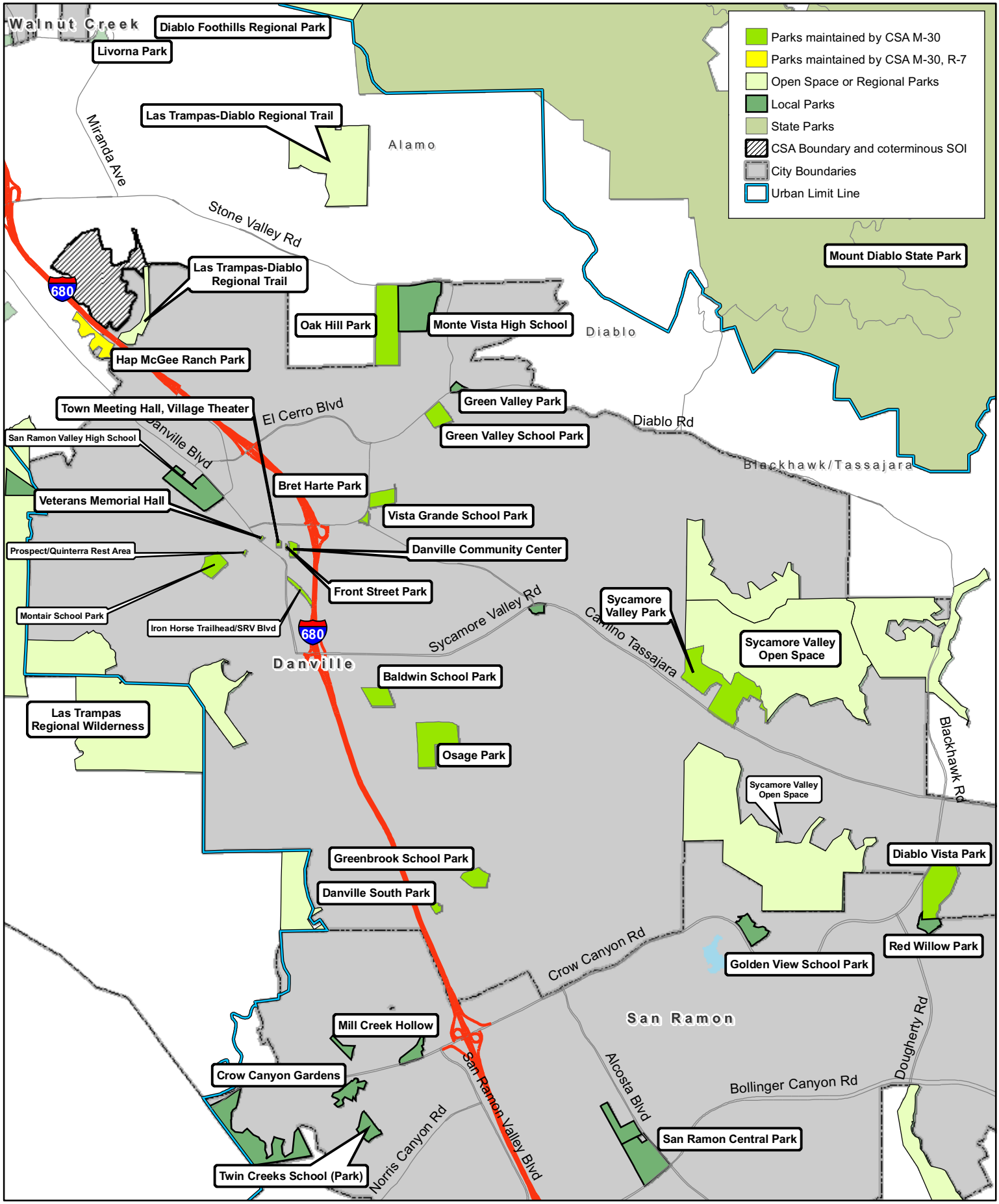
[196] Board of Equalization official date.

[197] Contra Costa LAFCO, Executive Officer Report to the Commission, November 19, 1997.

[198] Ibid, p. 2.

[199] Contra Costa LAFCO, CSA M-30 MSR, 2004, Exhibit A: Legal Description of Property.

Map 10-13 CSA M-30 and Coterminous Sphere of Influence



Map created 3/24/2010
by Contra Costa County Community Development, GIS Group
651 Pine Street, 4th Floor North Wing, Martinez, CA 94553-0095
37:59:48.455N 122:06:35.384W

This map was created by the Contra Costa County Community Development Department with data from the Contra Costa County GIS Program. Some base data, primarily City Limits, is derived from the CA State Board of Equalization's tax rate areas. While obligated to use this data the County assumes no responsibility for its accuracy. This map contains copyrighted information and may not be altered. It may be reproduced in its current state if the source is cited. Users of this map agree to read and accept the County of Contra Costa disclaimer of liability for geographic information.

Miles
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ACCOUNTABILITY AND GOVERNANCE

CSA M-30 is a dependent special district of Contra Costa County, and is governed by the County Board of Supervisors. Assessments are levied by the County and passed on to the Town of Danville for law enforcement in the unincorporated area through contract with the County Sheriff and park and recreation services provided by the Town within town limits.

CSA M-30 funds are administered by the Assistant Town Manager for the Town of Danville, who reports to the Town Council. There is also a Parks and Leisure Services Commission that oversees park maintenance and recreation programs in the Town, and reports to the Town Council. The Commission is comprised of seven members, one alternate and one junior member. All members of the Commission must be residents of the Town of Danville. Residents of the CSA may not sit on the Commission.

The Town conducts community outreach for park and recreation purposes through the Parks and Recreation Services Division and the Parks and Leisure Services Commission. The Department and Commission both perform outreach primarily through their websites with facility, program and meeting information.

Complaints may be submitted through phone calls, email, letters and in person to any member of the Parks and Recreation Division, the office of the Town Manager, the Parks and Leisure Services Commission, or the Town Council. The Town reported that there were no complaints regarding park and recreation services for CSA M-30 in 2008.

MANAGEMENT

The Town of Danville employs seven full-time parks maintenance employees. Park maintenance staff report to the Maintenance Services Manager, who reports to the Town Manager. The Maintenance Services Manager evaluates the performance of park maintenance employees quarterly and conducts workload monitoring consisting of tracking time worked on various projects through timesheets. Performance of the department is evaluated annually by the Town Manager and Town Council.

The Town of Danville conducts park planning through the annual budget, a capital improvement plan, the General Plan, and the Parks and Leisure Services Commission. The Parks and Leisure Services Commission serves as the advisory body on acquiring, developing, and maintaining park and recreation facilities for the Town.

The Town of Danville annually prepares audited financial statements. The most recent audited financial statement provided to LAFCO by the District was for FY 08-09. CSA funds are not tracked separately in the financial statement.

The Town's park and recreation services were reviewed as part of the LAFCO Central County Sub-regional MSR (September 2009).

SERVICE DEMAND AND GROWTH

The District bounds encompass residential and open space areas. Single-family residential dwelling units are located along Alamo Springs Drive, Corrie Place and Kimberly Place. Open space areas are located primarily southwest of Alamo Springs Drive. There is no significant business activity within the CSA boundary area.

The CSA considers its customer base to be the residents of the 26 dwelling units that pay assessments to the CSA. The estimated population within the CSA is 70.[200] The CSA's population density is 305 per square mile, compared with the 2009 countywide density of 1,473. Of the 26 existing dwelling units within the CSA, 19 were constructed between 1999 and 2001, and the remaining seven units were constructed between 2003 and 2008. There are 15 vacant parcels within the CSA that could support single family residential development in the future. Build-out of the CSA will yield a total population of approximately 120.

The CSA is a dependent special district of the County, and is not a land use authority. The County is the land use authority, and holds primary responsibility for implementing growth strategies. In the case of Subdivision 7452 in Alamo Springs, the County and Town jointly approved all land use entitlements in the area.

FINANCING

The County collects benefit assessment revenue from the properties in the CSA, which was planned to be transferred to the Town annually and dispersed to the various service departments and districts; however, due to problems concerning the CSA, the Town did not receive reimbursement from the County until FY 09-10, including $15,982 for FY 08-09 and $62,422 for all previous years from the time the CSA began collecting assessments in FY 00-01.[201]

Once transferred to the Town, the funds are allocated and expended according to existing services levels provided within the Town's boundaries. For park maintenance and roadside landscaping, CSA funds are distributed to the LLAD to match the assessment paid by residences in the incorporated area for landscaping ($40.20 per dwelling unit) and double the assessment for park maintenance ($67.80 per dwelling unit). The City reported that the park maintenance assessment is doubled as the LLAD assessment is set at 50 percent of the cost of park maintenance while the other 50 percent is paid out of general fund revenues. Of the remaining CSA funds, 91 percent is apportioned to law enforcement services and nine percent is apportioned to road maintenance services, based on the expense per housing unit within the town limits in the previous fiscal year.

The annual benefit assessment per single family dwelling unit was $810 in FY 09-10, of which the Town receives $646.49, CSA L-100 receives $14.94, and the County receives $148.57 for CSA administration. The assessment is adjusted annually according to the Consumer Price Index.

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[200] Based on the average household population of 2.7 for unincorporated Contra Costa County in 2009, according to the Department of Finance.

[201] Correspondence with Rob Ewing, City Attorney, January 20, 2010.

The Town reported that the current level of financing is generally adequate to provide services to the CSA.

Table 10-25: CSA M-30 Financial Information, FY 08-09

CSA M-30, FY 08-09			
General Financing Approach			
In FY 08-09, services in the CSA were financed almost entirely by benefit assessments. Park and recreation facility maintenance comprised 22 percent of expenditures for the CSA.			
CSA M-30 Fund managed by Contra Costa County			
Revenues		**Expenditures**	
Total Available Funding	$81,370	Total Operating Expenditures	$65,894
Beginning Fund Balance	$60,248	Administration	$4,719
Total Operating Revenues	$21,122	Transfer to City (reported by City)[1]	$15,982
Property Tax	$0	Transfer to CSA L-100	$0
Special Tax & Assessment	$20,670	Refunds to property owners	$16,345
Use of Money and Property	$452	Services and supplies[2]	$28,849
CSA M-30 fund allocation managed by the Town of Danville			
Revenues		**Expenditures**	
Total Operating Revenues	$15,982	Total Operating Expenditures	$15,982
Transfers from County[1]	$15,982	Law Enforcement	$10,384
Transfers from City General Fund	$0	Park Maintenance	$3,526
		Road Maintenance	$1,027
		Landscaping	$1,045
Notes:			
(1) Transfers from the County indudes funds for FY 08-09 expenditures which were not received until FY 09-10.			
(2) Services and supplies consists of consultant costs to work with the Town of Danville on assessments collected in error.			

PARK AND RECREATION SERVICES

Nature and Extent

In addition to law enforcement, road maintenance, landscaping and street lighting services, CSA M-30 funds are used to provide park and recreation facility maintenance through the Town of Danville's Lighting and Landscape Assessment District. District funds are used to maintain all town-owned facilities, in addition to six school parks, the Veterans Memorial Hall, the Prospect/Quinterra Rest Area, and the Iron Horse Trailhead, which are not owned by the Town. Funds from the CSA are equally distributed to the park facilities regardless of proximity to the CSA. While the Town also provides recreation services directly through its Recreation Department, CSA funds are not allocated to the Recreation Department.

Location

CSA services are provided to the unincorporated community of Alamo Springs. The CSA is staffed and served by the Town of Danville for park and recreation services. All Town park and recreation facilities are located within the town limits with the exception of Hap Magee Ranch Park

which is partially within the Town (9.1 acres) and partially in the unincorporated portion of Contra Costa County (8.1 acres). There are no park and recreation facilities within the CSA.

The Town reported that residents of the CSA may use Town park and recreation facilities for the same fee as town residents;[202] however, the Town's recreation guide reports that those living outside of the Town must pay nonresident fees.[203] The recreation guide does not make an exception for Alamo Springs residents. The Town should consider clarifying in the guide that residents of the CSA may pay resident fees.

Park and Recreation Facilities

Park facilities maintained using CSA funds include all park facilities within the Town of Danville. The Town owns and maintains five community parks, two neighborhood parks, four pocket parks and two special use facilities, which total 167 acres of town-owned parkland.[204] In addition the Town maintains and improves 27.4 acres of parkland at five school parks and sport facilities, the Veterans Memorial Hall, the Prospect/Quinterra Rest Area, and the Iron Horse Trailhead.[205]

Most of the Town's infrastructure is relatively young or has been refurbished within the past 25 years. No major deficiencies were noted in the Town's park infrastructure.[206] The Town has planned approximately $5.2 million for all park capital improvements between FY 09-10 and FY 13-14.[207]

Existing facilities within the Town appear to have sufficient capacity to serve residents within CSA M-30 boundaries presently and into the future. Town-owned park facilities consist of 3.8 parkland acres per 1,000 residents. If town-maintained facilities are included, then the Town provides 4.5 acres of parkland per 1,000 residents. The California parkland standard, established by the Quimby Act, is between three and five acres per 1,000 residents, which the Town meets. However, the Town has adopted more stringent parkland guidelines of five acres of parkland per 1,000 residents, which the Town does not meet unless park and recreation facilities owned and maintained by other providers are included.

With regard to service levels within CSA M-30, the only park facility within 0.5 miles of the CSA is Hap Magee Ranch Park. The park encompasses 17.2 acres and is located partially within the Town and partially within the unincorporated area. The park provides adequate parkland capacity for the CSA's 70 residents according to Town parkland standards.

The Town of Danville has a joint development, maintenance, and management agreement with Contra Costa County for Hap Magee Ranch Park and a joint use agreement with the San Ramon

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[202] Interview with Rob Ewing, Town of Danville City Attorney, February 1, 2009.

[203] Town of Danville, *Recreation Guide Winter 2010*, p. 3.

[204] Town of Danville, *General Plan 2010*, 1999, p. 100.

[205] Ibid.

[206] LAFCO, *Central County Sub-Regional MSR*, 2009, p. IV-7.

[207] Town of Danville, *Capital Improvement Program*, 2009, p. 24.

Valley Unified School District for use of recreation facilities.[208] In addition, the Town provides maintenance for the Veterans Memorial Hall, the Prospect/Quinterra Rest Area, and the Iron Horse Trailhead. No further opportunities for facility sharing were identified.

Table 10-26: CSA M-30 Park and Recreation Services

CSA M-30 Park and Recreation Service Adequacy and Facilities						
Service Configuration						
Park Maintenance	Direct through LLAD	Recreation Programming			Town of Danville	
Service Adequacy[1]						
Maintained Park Acres	195.1	Total Park Acres per 1,000[2]			4.6	
Active Parkland	127.6	Active Parkland per 1,000			3.0	
Passive Parkland	78.0	Passive Parkland per 1,000			1.8	
Park Maintenance Cost per Acre	$936					
Recreation Facilities and Parks						
Name	**Location**	**Property Owner**	**Park Type**	**Facilities**	**Condition**	**Acres**
Diablo Vista Park	1000 Tassajara Ranch Dr. Danville, CA 94526	Town of Danville	Active	Water feature, picnic facilities, volleyball, basketball court, 2 tennis courts, 2 baseball/softball fields, 2 soccer fields	Good	31.8
Hap Magee Ranch Park[3]	1025 La Gonda Way Danville, CA 94526	County/Town of Danville	Passive	Three ranch-style homes, trails, large meadow	Good	17.2
Oak Hill Park	3005 Stone Valley Rd. Danville, CA 94526	Town of Danville	Passive	Play area, horseshoes, pond fishing, picnic facilities, trails, community building	Excellent/ Good	43.7
Osage Station Park	816 Brookside Dr. Danville, CA 94526	Town of Danville	Active	Play area, rose garden, par course, 4 tennis courts, 4 baseball/softball fields, 5 soccer fields, picnic facilities, jogging path	Good	30.1
Sycamore Valley Park	2101 Holbrook Dr. Danville, CA 94526	Town of Danville	Active	Play area, water features, 5 baseball/softball fields, 4 soccer fields, picnic facilities, jogging path	Good	44.3
Danville South Park	90 Serene Ct. Danville, CA 94526	Town of Danville	Passive	Play area, basketball court, picnic tables	NP	1.4
Greenbrook School Park	1475 Harlan Dr. Danville, CA 94526	Town of Danville	Passive	Play area, picnic tables	NP	1.0
Bret Harte Park	2101 Vista Grande St. Danville, CA 94526	Town of Danville	Passive	Passive open space	NP	0.6

[208] LAFCO, *Central County Sub-Regional MSR*, 2009, p. IV-7.

Recreation Facilities and Parks Name	Location	Property Owner	Park Type	Facilities	Condition	Acres
El Pintado Park	W. El Pintado Danville, CA 94526	Town of Danville	Passive	Benches	NP	0.5
Front Street Park	400 Front St. Danville, CA 94526	Town of Danville	Passive	Picnic tables, benches	Good	0.2
Prospect Corner Park	W. Prospect Ave. and Hartz Ave. Danville, CA 94526	Town of Danville	Passive	Seating area	NP	0.1
Danville Library/Community Center Town Green	420 Front Street Danville, CA 94526	Town of Danville	Passive	2-building complex, plaza, bandstand, passive open space	Good	3.0
Town Meeting Hall, Village Theatre and Parking Lot	233 Front Street Danville, CA 94526	Town of Danville	Passive	2-building multi-purpose complex	Good	1.3
Baldwin School Park	741 Brookside Dr. Danville, CA 94526	SRVUSD	Active	Play area, covered and lighted basketball court, 2 baseball/softball fields, 1 soccer field, picnic tables	Good	6.7
Green Valley School Park	1001 Diablo Rd. Danville, CA 94526	SRVUSD	Active	Play area, 2 baseball/softball fields, 3 soccer fields	NP	5.7
Montair School Park	300 Quinterra Lane Danville, CA 94526	SRVUSD	Active	Play area, picnic tables, 1 baseball/ softball field, 1 soccer field	NP	4.5
Vista Grande School Park	667 Diablo Rd., Danville, CA 94526	SRVUSD	Active	2 softball/baseball fields, 2 soccer fields, walking path	Excellent	3.0
San Ramon Valley High School Tennis Courts	501 Danville Blvd. Danville, CA 94526	SRVUSD	Active	4 lighted tennis courts	Good	0.3
Monte Vista High School Tennis Courts	3131 Stone Valley Rd. Danville, CA 94526	SRVUSD	Active	8 tennis courts	Good	1.2
Veterans Memorial Hall	400 Hartz Ave. Danville, CA 94526	Town of Danville	Passive	Multi-purpose meeting facility	Poor	0.3
Prospect/Quinterra Rest Area	W. Prospect Ave. and Quinterra Ln. Danville, CA 94526	Town of Danville	Passive	Seating, information kiosk, bike racks	Good	0.8
Iron Horse Trailhead/SRV Boulevard	526 San Ramon Valley Blvd, Danville, CA 94526	Town of Danville	Passive	Open space	Good	0.3
Trails	Various	Town of Danville	Passive	Open space	Good	7.7

Notes:

(1) Active parkland consists of developed parkland with active recreation programming and sports facilities, such as active ball courts (e.g., basketball or tennis), delineated sports fields (e.g., soccer, baseball, softball), aquatic facilities, gymnasiums, etc. Passive parkland consists of developed or undeveloped parkland containing trails, walkways, cultural or scenic resources, open fields, picnic tables/shelter, tot lots, etc., but not containing facilities used for active recreation programming.

(2) Acres per 1,000 population based on average household size.

(3) Hap Magee Ranch Park serves CSA R-7, CSA M-30 and the Town of Danville, with maintenance of the park split between the County and Town.

CSA M-30 GOVERNANCE ALTERNATIVES

CSA R-7 Zone A encompasses the bounds of CSA M-30 with the exception of approximately seven acres adjacent to the Town of Danville. Residents within CSA M-30 pay a benefit assessment to the County, which is transferred to the Town for enhanced parks and recreation, law enforcement, street maintenance, landscaping, and street lighting.[208] The residents within CSA M-30 are also paying property taxes to CSA R-7 for park and recreation services. Although CSA M-30 residents are paying for park and recreation services to two CSAs there are no park facilities within the subdivision. The nearest park facility is Hap Magee Ranch Park, which lies partially within the Town of Danville and unincorporated Contra Costa County, is jointly owned and maintained by the County (CSA R-7) and the Town (supplemented with CSA M-30 funds). The nearest County-owned facility financed solely by CSA R-7 funds is Andrew H. Young Park, which is approximately one mile from the border of CSA M-30. One governance alternative may be the removal of the territory in CSA M-30 from CSA R-7 to eliminate duplication of services. Another option may be the consolidation of the two CSAs into a single CSA. Such a CSA would require a zone for the area formerly within CSA M-30 to maintain the financing mechanism for enhanced services by the Town of Danville per the agreement between the Town and the County.

CSA M-30 MSR DETERMINATIONS

Growth and population projections

1) The 2009 residential population within the district was estimated to be 70. Recent growth has been high as the subdivision began construction in 1999. Of the 26 existing dwelling units within the CSA, 19 were constructed between 1999 and 2001, and the remaining seven units were constructed between 2003 and 2008.
2) There are 15 vacant parcels within the CSA that could support single family residential development in the future. Build-out of the CSA will yield a total population of approximately 120.

Present and planned capacity of public facilities and adequacy of public services, including infrastructure needs and deficiencies

3) With regard to service levels within CSA M-30, the only park facility within 0.5 miles of the CSA is Hap Magee Ranch Park. The park provides adequate parkland capacity for the CSA's 70 residents, according to Town parkland standards.
4) It is recommended that the Town clarify in its recreation guide its policy regarding CSA residents being eligible for town recreation programming resident fees.
5) The Town of Danville has planned approximately $0.6 million in park capital improvements by 2014, to improve Town parks serving residents of the CSA.

[208] Residents of CSA M-30 also pay property tax to CSA P-6 and a special assessment and property tax to CSA P-2 (Zone B) for police protection services, which may be an additional duplication of services, as CSA M-30 assessments also fund law enforcement through the Town of Danville, by contract with the Sheriff.

Financial ability of agencies to provide services

6) The Town reports that the current level of financing is sufficient for adequate service provision.

7) The County has been slow to reimburse the Town for funds that were paid in advance to provide services to the area. It is recommended that the County and City work to ensure timely reimbursement.

Status of, and opportunities for, shared facilities

8) The Town of Danville has a joint development, maintenance, and management agreement with Contra Costa County for Hap Magee Ranch Park and a joint use agreement with the San Ramon Valley Unified School District for use of recreation facilities.

9) No further opportunities for facility sharing were identified.

Accountability for community service needs, including governmental structure and operational efficiencies

10) Accountability to local voters is constrained as the CSA does not have an advisory committee to act as a sounding board for the community to voice local preferences to the County or the Town. In addition, CSA residents are not eligible to sit on the Park and Leisure Services Commission.

11) The Town should consider allowing CSA residents to the sit on the Park and Leisure Services Commission to enhance accountability.

12) The CSA and Town demonstrated accountability and transparency by disclosing financial and service related information in response to LAFCO requests.

CSA M-30 SOI RECOMMENDATIONS AND DETERMINATIONS

The existing SOI for CSA M-30 is coterminous with its bounds. The SOI for the district was affirmed by LAFCO in 2004.

Agency Proposal

No changes to the CSA's SOI were proposed by the County or the Town of Danville.

SOI Options

Given the considerations addressed in the MSR, two options are identified for the CSA M-30 SOI:

SOI Option #1 – Retain existing coterminous SOI

If LAFCO determines that the existing government structure is appropriate, then the existing SOI should be retained. This option would enable the district to continue to include the areas within its SOI in its long-term planning.

SOI Option #2 – Adopt a zero SOI for CSA M-30 and retain existing coterminous SOI for CSA R-7 Zone A

In order to eliminate duplication of services, one option is to consolidate CSAs R-7 and M-30. The area formerly within CSA M-30 could be made into a zone to continue financing services within the Town of Danville per the agreement between the Town and the County. Should LAFCO determine that consolidation of the two CSAs is appropriate, then the existing SOI for CSA R-7 would be retained and a zero SOI would be adopted for CSA M-30 to indicate LAFCO's expectation that CSA M-30 will eventually be consolidated into CSA R-7.

Recommendation

The recommended SOI for CSA M-30 is to retain its existing coterminous SOI and concurrently reduce the SOI for CSA R-7 to exclude the areas that are presently within the CSA M-30 boundaries and eliminate duplication of services in the area. Residents within CSA M-30 pay a benefit assessment to the County, which is transferred to the Town for enhanced parks and recreation, law enforcement, street maintenance, landscaping, and street lighting.[210] The residents within CSA M-30 are also paying property taxes to CSA R-7 for park and recreation services. Although CSA M-30 residents are paying for park and recreation services to two CSAs there are no park facilities within the subdivision. The nearest park facility is Hap Magee Ranch Park, which lies partially within the Town of Danville and unincorporated Contra Costa County, is jointly owned and maintained by the County (CSA R-7) and the Town (supplemented with CSA M-30 funds). The nearest County-owned facility financed solely by CSA R-7 funds is Andrew H. Young Park, which is approximately one mile from the border of CSA M-30. It appears appropriate that the Town continue providing park services to CSA M-30 residents and CSA R-7 cease providing duplicated services to the area.[211] While consolidation is an option to eliminate this duplication of services, such a consolidation may not improve efficiency by creating a more complex agency with layers of zones and financing mechanisms.

Table 10-27: CSA M-30 SOI Analysis

Issue	Comments
SOI update recommendation	Retain the existing coterminous SOI for CSA M-30 and concurrently reduce the SOI for CSA R-7 to exclude the areas that are presently within the CSA M-30 boundaries and SOI.
Services provided	In addition to law enforcement, road maintenance, landscaping and street lighting services, CSA M-30 funds are used to provide park maintenance through the Town of Danville's Lighting and Landscape Assessment District.
Present and planned land uses in the area	The District bounds encompass residential and open space areas. Single-family residential dwelling units are located along Alamo Springs Drive, Corrie Place and Kimberly Place. Open space areas are located primarily southwest of Alamo Springs Drive. There is no significant business activity within the CSA boundary area.

[210] Residents of CSA M-30 also pay property tax to CSA P-6 and a special assessment and property tax to CSA P-2 (Zone B) for police protection services, which may be an additional duplication of services, as CSA M-30 assessments also fund law enforcement through the Town of Danville, by contract with the Sheriff.

[211] However, it should be noted that the nearest park facility to CSA M-30 is Hap Magee Ranch Park, which is maintained by both the Town and County equally.

Projected growth in the District/Recommended SOI	There are 15 vacant parcels within the CSA that could support single family residential development in the future.
Present and probable need for public facilities and services in the area	There is a present and probable need for park services. Demand for services is anticipated to increase as the remaining 15 vacant parcels are developed.
Opportunity for infill development rather than SOI expansion	An SOI expansion is not recommended at this time.
Service capacity and adequacy	With regard to service levels within CSA M-30, the only park facility within 0.5 miles of the CSA is Hap Magee Ranch Park. The park provides adequate parkland capacity for the CSA's 70 residents, according to Town parkland standards
Social or economic communities of interest	Communities of interest within the CSA include the newly constructed Subdivision 7452 in Alamo Springs and the landowners within the CSA that pay benefit assessments to the District.
Effects on other agencies	An SOI reduction, and eventual removal of the areas in CSA M-30 from CSA R-7, would likely have little impact on other agencies given the small size of the CSA (26 dwelling units). The CSA M-30 area would continue receiving park and recreation services from the Town of Danville.
Potential for consolidations or other reorganizations when boundaries divide communities	In order to eliminate duplication of services, one option is to consolidate CSAs R-7 and M-30. The area formerly within CSA M-30 could be made into a zone to continue financing services within the Town of Danville per the agreement between the Town and the County. However, such a consolidation may not improve efficiency by creating a more complex agency with layers of zones and financing mechanisms.
Location of facilities, infrastructure and natural features	All CSA financed facilities are located within the Town of Danville with the exception of Hap Magee Ranch Park which is partially within the Town and partially in the unincorporated portion of Contra Costa County.
Willingness to serve	The CSA presently serves the area through the Town of Danville and CSA L-100. These agencies are willing to continue to provide services to the CSA.
Potential effects on agricultural and open space lands	The SOI recommendation for the District is not anticipated to directly impact agricultural and open space lands.
Potential environmental impacts	Although no potential environmental impacts were identified in the MSR, the LAFCO counsel and planner should make CEQA determinations.

CSA R-4

CSA R-4 provides financing for augmented operation and maintenance of park and recreation facilities and recreation programming in the incorporated Town of Moraga, for the unincorporated area to the southeast of the Town.

FORMATION AND BOUNDARY

CSA R-4 was formed on December 1, 1970 as a dependent special district of the County.[211] The boundary area of the CSA is approximately 17.6 square miles, or approximately 11,264 acres, of which the incorporated Town of Moraga consists of 9.3 square miles.

The CSA encompasses both incorporated and unincorporated areas. The CSA was formed prior to the incorporation of the Town of Moraga, which occurred in 1974. According to LAFCO and Board of Equalization records, the incorporated territory was never officially removed from the CSA; however, landowners within the town limits no longer pay a portion of their property tax to the CSA. LAFCO stipulated that approval of the incorporation was subject to the following conditions regarding the CSA: 1) the City shall annually pay its proportional share of CSA R-4 outstanding debts in amount as determined by the County Auditor-Controller, and 2) the City shall agree that it will pay its proportional share of maintenance and operation costs of County Service Area R-4.[212]

The SOI for CSA R-4 is coterminous with the boundary of the CSA.

Boundary History

There has been one change to the CSA boundary since formation in 1970. In 1972, the Lafayette-Moraga Reorganization annexed three parcels to the CSA totaling approximately 109 acres.

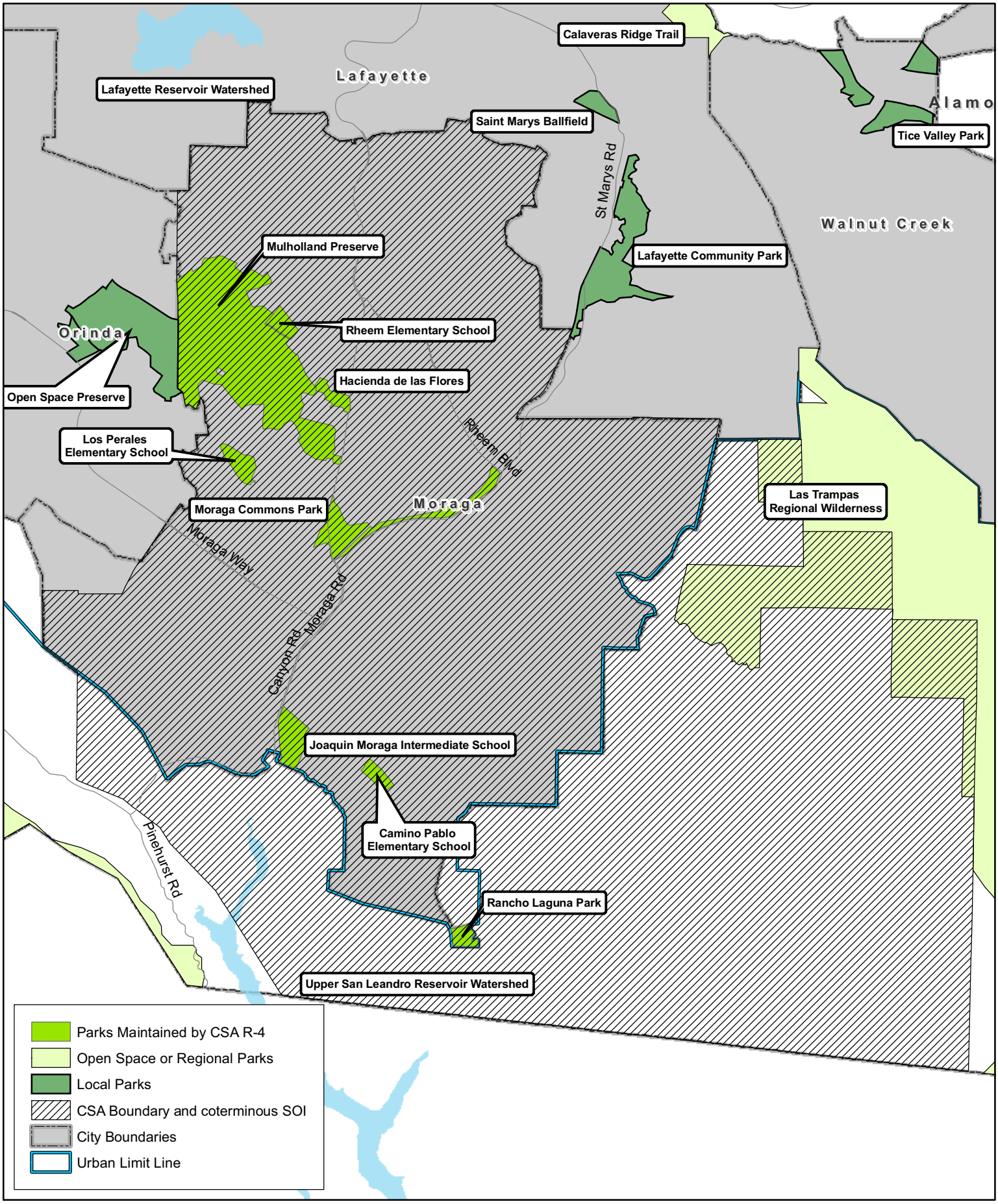
ACCOUNTABILITY AND GOVERNANCE

CSA R-4 is a dependent special district of Contra Costa County, and is governed by the County Board of Supervisors. Property tax is levied by the County and passed on to the Town of Moraga for park and recreation services.

[211] Board of Equalization official date.

[212] Adopted on by LAFCO on 3/6/74 and recorded on 11/12/74.

Map 10-14 CSA R-4 and Coterminous Sphere of Influence



Map created 3/24/2010
by Contra Costa County Community Development, GIS Group
651 Pine Street, 4th Floor North Wing, Martinez, CA 94553-0095
37:59:48.455N 122:06:35.384W

This map was created by the Contra Costa County Community Development Department with data from the Contra Costa County GIS Program. Some base data, primarily City Limits, is derived from the CA State Board of Equalization's tax rate areas. While obligated to use this data the County assumes no responsibility for its accuracy. This map contains copyrighted information and may not be altered. It may be reproduced in its current state if the source is cited. Users of this map agree to read and accept the County of Contra Costa disclaimer of liability for geographic information.

Miles
0 0.25 0.5 1

CSA R-4 funds are administered by the Town Manager, for the Town of Moraga, who reports to the Town Council. There is also a Parks and Recreation Commission that oversees park and recreation programs in the Town, and reports to the Town Council. The Commission is comprised of seven members—all residents of the Town of Moraga. Individuals from the unincorporated portion of the CSA may not sit on the Commission.

The Town conducts community outreach for parks and recreation purposes through the Department of Parks and Recreation and the Parks and Recreation Commission. The Department and Commission both perform outreach primarily through their activity guides with facility, program and meeting information.

Complaints may be submitted through phone calls, email, letters and in person to any member of the Parks and Recreation staff, the office of the Town Manager, the Parks and Recreation Commission, or Town Council. Complaints most often relate to charging seniors for recreation programming and development proposed at Rancho Laguna Park. In 2008, the Town estimated that there were approximately 12 complaints. In order to gauge community satisfaction with recreation programs and identify potential improvements, the Town implemented a survey program in 2009, with evaluations to be completed at the end of class sessions by all participants.

The Town demonstrated full accountability in its disclosure of information and cooperation with LAFCO. The Town responded to LAFCO's written questionnaires and cooperated with LAFCO map inquiries and document requests regarding CSA R-4.

MANAGEMENT

The Town of Moraga runs a full-service parks and recreation department with a staffing level of 2.5 FTE, consisting of a Parks and Recreation Director, a Recreation and Facilities Coordinator, and a Recreation Assistant. The parks and recreation staff report to the Town Manager and the Town Council. The parks are maintained by 2.5 FTE public works staff.

The Parks and Recreation Director evaluates employee performance annually. Workload monitoring is conducted informally due to the small size of the parks and recreation staff. The department does not conduct benchmarking, but has completed analysis of park acreage levels as part of the planning process.

The Town of Moraga prepared a Parks and Recreation Master Plan in 2007, a Park Development Impact Fee Study in 2008, and also includes park and recreation planning in the Town General Plan (2002). Park and recreation goals and objectives are also evaluated annually in the budget. The Town does not prepare a capital improvement plan specific to park and recreation improvements; however, capital improvement needs and costs have been outlined in the Parks Master Plan. The Town annually prepares audited financial statements; however, CSA information is not identifiable in these statements.

The Town's park and recreation services were reviewed as part of the Central County Sub-regional MSR (September 2009).

SERVICE DEMAND AND GROWTH

The CSA bounds encompass the incorporated Town of Moraga and an unincorporated area to the southeast of the Town. The unincorporated area is primarily zoned as agricultural land with parcels of at least five acres and limited residential parcels of at least 15,000 to 20,000 square feet. A majority of the property in the unincorporated area is owned by East Bay Municipal Utility District.

The District considers its customer base to be the residents within the CSA. As of 2009, the District had a population of approximately 16,341—including 16,204 residents of the Town of Moraga, according to the Department of Finance, and an estimated 137 residents in the unincorporated area.[213] The CSA's population density is 928 per square mile, compared with the 2009 countywide density of 1,473. The Town and unincorporated area in the CSA has not experienced significant recent growth; however, the Town reported that there had been an increase in demand for park services since approximately 2000, particularly at Rancho Laguna Park.

Growth within in the incorporated portion of the CSA is anticipated to be moderate with projected growth of 10 percent within the Town between 2009 and 2025.[214] Planned and proposed residential developments within the Town total over 650 dwelling units. Those of greater than 100 dwelling units include: 1) Rancho Laguna II (180 acres), 2) Bollinger Valley (126 dwelling units), 3) Indian Valley (150 dwelling units), and 4) Palos Colorados (123 dwelling units). Growth in the unincorporated area is anticipated to be limited. There are no planned or proposed developments, as the area is outside of the urban limit line. The projected population within the entire CSA by 2025 is 17,699.

The CSA is a dependent special district of the County, and is not a land use authority. The County is the land use authority in the unincorporated area, while the Town of Moraga is the land use authority within the Town's limits. These agencies hold primary responsibility for implementing growth strategies.

[213] The unincorporated population is based on approximately 51 dwelling units in the area multiplied by the average household size of 2.7 in unincorporated Contra Costa County.

[214] ABAG, Projections 2009.

FINANCING

Table 10-28: CSA R-4 Financial Information, FY 08-09

CSA R-4, FY 08-09			
General Financing Approach			
In FY 08-09, revenues for the CSA were entirely from property taxes levied in the unincorporated portion of the District. Of the revenues, 99 percent was transferred to the Town of Moraga into the general fund for use by the Park and Recreation Department and one percent was used to reimburse the County for administration costs. Use of these funds by the Town are not reported separately, but are pooled into the Parks and Recreation Department's budget, which was approximately $443,000 in FY 08-09.			
Revenues		**Expenditures**	
Total Operating Revenues	$26,898	Total Operating Expenditures	$26,898
Property Tax	$26,898	Administration	$289
Park & Recreation Fees[1]	$0	Facility Maintenance	NA
Other/General Fund[2]	$0	Recreation & Senior Services	NA
Park Dedication Fees	$0	Capital Outlays	NA
Intergovernmental/Grants	$0	Transfers to Town of Moraga	$26,609
Notes:			
(1) Park and recreation fees include fees for recreation services, facility rentals and concessions.			
(2) Other general fund sources include sources other than those listed separately (i.e., park and recreation fees, property tax).			

PARK AND RECREATION SERVICES

Nature and Extent

CSA R-4 provides park and recreation facility operation and maintenance and recreation programming services through the Town's Park and Recreation Department and Public Works Department. The Town provides all administration and maintenance services directly through town employees. Recreation programming is provided by contractors, non-town organizations, and in conjunction with East Bay Regional Park District (EBRPD) and Lamorinda Seniors Program at town-owned facilities. Recreation services include 29 summer camps, soccer camp, and a wide variety of fitness, music, art, educational, and cooking classes.

Location

CSA funded services are provided within the Town of Moraga, not in the unincorporated areas, although landowners in the unincorporated areas are paying a portion of their property taxes to the CSA. The CSA is staffed and served by Town of Moraga staff, who are responsible for providing service to the entire Town of Moraga city limits. Non-residents of the Town and CSA may use the park and recreation facilities and programs for the same fees as residents.

Parks and Recreation Facilities

Parks and recreation facilities serving the CSA are all located within the Town of Moraga's boundaries. Parks open to the public include four town-owned parks and four school parks owned by the Moraga School District, to which the Town subsidizes financing for facility maintenance.

Also located within the boundaries of CSA R-4 (in the unincorporated area) is a portion of the Las Trampas Regional Wilderness, operated by EBRPD.

Of the town-owned parks, Moraga Commons and Rancho Laguna Park were both identified by the Town as being in good condition. No facility needs were identified for Moraga Commons. The Town reported that Rancho Laguna Park was in need of a new playground, an amphitheater upgrade, and repairs to the turf and irrigation. Hacienda de las Flores was identified by the Town as being in poor condition and in need of ADA accessibility, kitchen upgrades, drainage improvements, repairs to the fireplace, refurbishment of the HVAC system and an expansion of the town office facilities. The Town reported that the Mulholland Preserve is in fair condition. The access road needs maintenance and the area generally requires weed abatement.

The Town of Moraga, and consequently CSA R-4, is slightly deficient in the amount of developed parkland and neighborhood parkland available to residents. Including all park and recreation facilities maintained by the Town (approximately 74 acres including both neighborhood and community parks), there were approximately 4.5 acres of developed parkland per 1,000 residents within the CSA, and 3.5 acres of developed parkland per 1,000 residents if the school facilities are excluded. The Town's General Plan identifies a goal of five acres of parkland per 1,000 residents, which means the Town must acquire an additional 7.8 acres of developed parkland (including school facilities) to meet the General Plan standard.

In terms of neighborhood parkland, the Town has approximately 25 acres if school facilities are included, yielding 1.5 acres per 1,000 residents. The Town of Moraga reported that 2 acres per 1,000 residents is the target standard for neighborhood parkland, meaning the Town needs at least an additional 7.4 acres of neighborhood parkland to meet the target neighborhood parkland standard.

The Town presently practices facility sharing and collaboration with the Moraga School District and EBRPD. The Town contributes funds to the school district for use of fields during non-school hours and weekends; however, the Town has chosen to slowly reduce the amount of funding provided to the schools over the next five years until funding is eliminated. The Town reported that it occasionally plans special events in conjunction with EBRPD. The Town recently ended a three-year cooperative relationship with the City of Lafayette, sharing recreation programs, in the hopes of providing enhanced recreation services. The CSA shares facilities with the Town of Moraga at the Hacienda de las Flores park, which is used by the Town of Moraga as their main town office.

Table 10-29: CSA R-4 Park and Recreation Services

CSA R-4 Park and Recreation Service Adequacy and Facilities						
Service Configuration						
Park Maintenance	Town of Moraga	Recreation Programming			Town of Moraga	
Service Adequacy[1]						
Maintained Park Acres	73.9	Total Park Acres per 1,000[3]			4.5	
Active Parkland	65.0	Active Parkland per 1,000			4.0	
Passive Parkland	258.9	Passive Parkland per 1,000			15.8	
Recreation Attendance[2]	17,650	Recreation Attendance per Resident			1.1	
Recreation Cost per Resident	$27.89	Park Maintenance Cost per Acre			$3,482	
Recreation Facilities and Parks						
Name	**Location**	**Property Owner**	**Park Type**	**Facilities**	**Condition**	**Acres**
Moraga Commons	St. Mary's Rd. and Moraga Rd.	Town of Moraga	Active	Amphitheater, basketball courts, volleyball courts, frisbee golf field, playgrounds, bocce ball courts, and skate park	Good	40.2
Hacienda de las Flores	Devin Dr.	Town of Moraga	Passive	Recreation buildings, hiking trails	Poor	8.9
Rancho Laguna	Knoll Dr. and Camino Pablo	Town of Moraga	Active	Amphitheater, volleyball court, turf area, picnic areas and playgrounds	Good	8.4
Camino Pablo Elementary School	1251 Camino Pablo	Moraga School District	Active	Multi-use field, basketball courts, wallball courts, playground, and multi-purpose room	Fair	3.0
Los Perales Elementary School	Corliss Dr.	Moraga School District	Active	Multi-use field, playground, and multi-purpose room	Fair	3.4
Rheem Elementary School	Laird Dr.	Moraga School District	Active	Multi-use field, basketball courts, wallball courts, and playgrounds	Fair	2.0
Joaquin Moraga Intermediate School	Canyon Rd. and Camino Pablo	Moraga School District	Active	Multi-use field, basketball courts, wallball courts, volleyball court and gym	Poor	8.0
Muholland Preserve	Along Donald Dr.	Town of Moraga	Passive	Hiking trails and open space	Fair	250.0

Notes:
(1) Active parkland consists of developed parkland with active recreation programming and sports facilities, such as active ball courts (e.g., basketball or tennis), delineated sports fields (e.g., soccer, baseball, softball), aquatic facilities, gymnasiums, etc. Passive parkland consists of developed or undeveloped parkland containing trails, walkways, cultural or scenic resources, open fields, picnic tables/shelter, tot lots, etc., but not containing facilities used for active recreation programming.
(2) Recreation attendance includes approximately 6,750 attendees of private facility rentals. Attendance was estimated by multiplying the average attendance at a private rental by the number of private rentals for the year. Attendance in recreation classes and special events was estimated using the average attendance per class or event multiplied by the number of times the class or event is held per year.
(3) Acres per 1,000 population based on average household size.

CSA R-4 GOVERNANCE ALTERNATIVES

CSA R-4 was formed prior to the incorporation of the Town of Moraga as a mechanism to collect funds for park and recreation services. Since the incorporation of the Town, the municipality has taken on the role of providing park and recreation services to the area. While residents and non-residents are welcome to join recreation programming and enjoy park facilities, the Town focuses its services on the needs of the residents within the incorporated boundaries of the Town. In addition, those in the unincorporated area have no representation on the Parks and Recreation Commission.

The unincorporated area in question is primarily uninhabited with approximately 51 dwelling units; however, the Rancho Laguna Park is located directly adjacent to a majority of these residential properties, and is likely used frequently by these homeowners. Non-residential lands located in the unincorporated portions of the CSA are primarily vacant agricultural (some Williamson Act) and open space lands, a large portion of which are owned by East Bay Municipal Utility District. Given that the CSA is collecting funds from a largely vacant and unimproved area to augment park and recreation services provided by the Town, one governance alternative may be detachment of the unincorporated vacant lands, or dissolution of the CSA entirely. Detaching any unincorporated areas from the CSA outside of the Town of Moraga would decrease the amount of property tax revenue available to the Town for park and recreation programming.

Establishing a subsidiary district in place of CSA R-4 is not presently an option because the Town of Moraga does not consist of 70 percent of the land area of the CSA, although it certainly contains more than 70 percent of the registered voters. If a significant portion of the unincorporated area within CSA R-4 were detached from the CSA, then a subsidiary district of the Town could be formed. If the Town of Moraga were to annex the unincorporated residential areas to the southeast of the Town in the future, then CSA R-4 could be dissolved entirely.

CSA R-4 MSR DETERMINATIONS

Growth and population projections

1) The estimated residential population within the CSA is approximately 16,341 (16,204 residents of the Town of Moraga and an estimated 137 residents in the unincorporated portion of the CSA).
2) Growth within the incorporated portion of the CSA is anticipated to be moderate with a projected growth rate of 10 percent within the Town between 2009 and 2025. Planned and proposed residential developments within the Town total over 650 dwelling units. The projected population within the CSA by 2025 is 17,699.

Present and planned capacity of public facilities and adequacy of public services, including infrastructure needs and deficiencies

3) The Town of Moraga, and consequently CSA R-4, is slightly deficient in the amount of developed parkland and neighborhood parkland available to residents. There were approximately 4.5 acres of developed parkland per 1,000 residents within the CSA, and 3.5 acres of developed parkland per 1,000 residents if the school facilities are excluded. The Town's General Plan identifies a goal of five acres of parkland per 1,000 residents, which

means the Town must acquire an additional 7.8 acres of developed parkland (including school facilities) to meet the General Plan standard.

4) In terms of neighborhood parkland, the Town has approximately 25 acres if school facilities are included, yielding 1.5 acres per 1,000 residents. The Town of Moraga reported that 2 acres per 1,000 residents is the target standard for neighborhood parkland, meaning the Town needs at least an additional 7.4 acres of neighborhood parkland to meet the target neighborhood parkland standard.

5) Recreation attendance in FY 08-09 was reported by the District to be approximately 17,650 participant days, or roughly 1.1 participant days per resident.

6) The Town of Moraga provides park and recreation services to the CSA area. The CSA serves as a financing mechanism to provide park and recreation services to the unincorporated areas adjacent to the Town of Moraga.

7) Infrastructure needs for the district include improvements to the building facilities at Hacienda de las Flores park, and improvements to recreation facilities at Joaquin Moraga Intermediate School.

8) The Town of Moraga conducts park-related planning through the Parks and Recreation Master Plan (adopted in 2007), a Park Development Impact Fee Study (2008), and the Town General Plan (2002). Park and recreation goals and objectives are also evaluated annually in the budget. The Town does not prepare a capital improvement plan specific to park and recreation improvements; however, capital improvement needs and costs have been outlined in the Parks Master Plan.

Financial ability of agencies to provide services

9) The Town reports that the current level of financing for the park and recreation department is sufficient; however, the Town faces challenges financing maintenance of a large open space area.

Status of, and opportunities for, shared facilities

10) The CSA shares facilities with the Town of Moraga at the Hacienda de las Flores park, which is used by the Town of Moraga as their main town office. The Town also shares facilities the Moraga School District, by contributing funds to the school district for use of fields during non-school hours and weekends; however, this funding is being phased out over the next five years. The Town reported that it occasionally plans special events in conjunction with EBRPD. The Town recently ended a three-year cooperative relationship with the City of Lafayette, sharing recreation programs, in the hopes of providing enhanced recreation services.

11) No new opportunities for facility sharing were identified by the Town of Moraga.

Accountability for community service needs, including governmental structure and operational efficiencies

12) Public accountability for park and recreation programs is achieved by the Parks and Recreation Commission. The Commission reports to the Town Council, and is comprised of seven public members. Accountability for CSA residents in unincorporated areas is limited because only residents of the Town of Moraga may sit on the Commission.

13) The CSA demonstrated accountability and transparency by disclosing financial and service related information in response to LAFCO requests.

CSA R-4 SOI RECOMMENDATIONS AND DETERMINATIONS

The existing SOI for CSA R-4 is coterminous with its bounds. The SOI for the district was affirmed by LAFCO in 2004.

Agency Proposal

The agency reported a desire to retain its existing coterminous SOI.

SOI Options

Given the considerations addressed in the MSR, four options are identified for the CSA R-4 SOI:

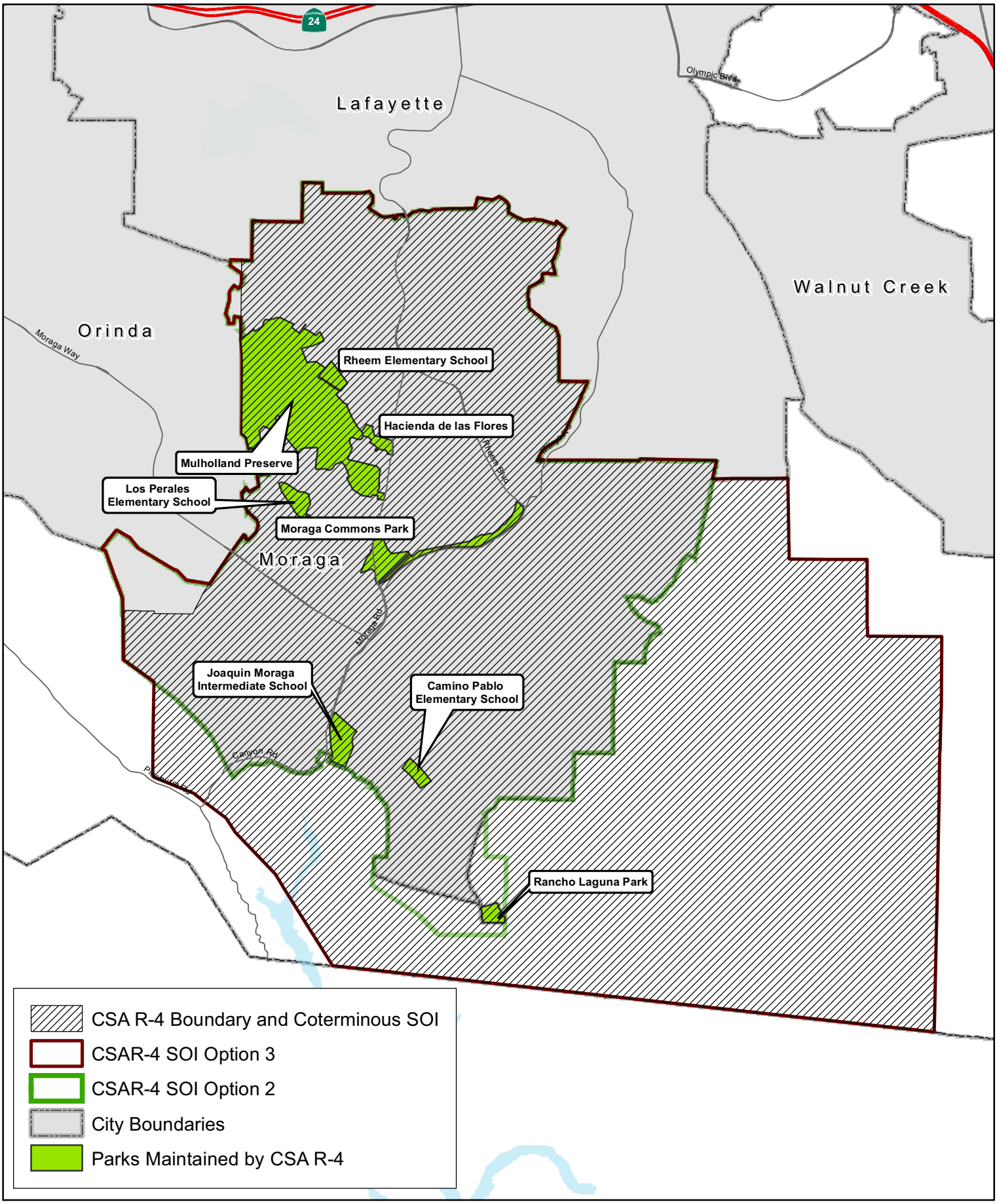
SOI Option #1 – Retain existing coterminous SOI

If LAFCO determines that the existing government structure is appropriate, then the existing SOI should be retained. This option would enable the Town of Moraga to continue to include the unincorporated areas within the CSA R-4 SOI in its long-term planning for parks and recreation services.

SOI Option #2 – Adjust SOI to remove vacant unincorporated areas and include entire Town of Moraga Bounds

If LAFCO determines that vacant and unimproved areas located in unincorporated Contra Costa County should not be included within CSA R-4, then the SOI for the CSA should be reduced to exclude these areas. Such an SOI would signal that LAFCO anticipates that these areas will eventually be detached from the District. The CSA R-4 SOI would continue to include improved residential areas located adjacent to the town boundaries, and these areas would not be detached from the CSA. In the event that the Town of Moraga were to annex these residential areas in the future, then CSA R-4 could be dissolved. This SOI option would also expand the SOI of CSA R-4 to include the entire Town of Moraga bounds (see SOI Option #3 for additional details).

Map 10-15 CSA R-4 SOI Options Two and Three



Map created 3/10/2010
by Contra Costa County Community Development, GIS Group
651 Pine Street, 4th Floor North Wing, Martinez, CA 94553-0095
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SOI Option #3 – SOI expansion to include entire Town of Moraga Bounds

Because the CSA was formed prior to the incorporation of the Town of Moraga, there are three areas in the western portion of the Town that extend beyond the boundaries of the CSA. Expanding the SOI for CSA R-4 to include these areas would signal that LAFCO anticipates that these areas will eventually be annexed into the CSA. Because there are no property taxes or assessments collected by the CSA within the Town of Moraga, and parks and recreation services are provided directly by the Town, annexing these areas into the CSA would have no impact on existing services levels or financing. This SOI option would leave vacant unincorporated areas to the south and east of the Town within the CSA R-4 SOI.

SOI Option #4 – Zero SOI

If LAFCO determines that unincorporated areas adjacent to the Town of Moraga should not be funding park and recreation services in the Town of Moraga, then the SOI for the CSA should be eliminated. A zero SOI would signal that LAFCO anticipates that CSA R-4 will eventually be dissolved. The Town of Moraga would continue providing park and recreation services to the town boundaries, and residents of adjacent unincorporated areas would use the parks and related facilities without paying property tax to the Town.

Recommendation

It is recommended that LAFCO adopt an SOI for CSA R-4 that includes the entire Town of Moraga and improved parcels to the southeast of the Town, but excludes vacant and unimproved areas located in unincorporated Contra Costa County (SOI Option #2). These areas are not demanding park and recreation services from the Town of Moraga, unlike adjacent residential areas that are. Residential parcels located in the unincorporated areas should remain within CSA R-4, paying property tax to the Town of Moraga, to fund the parks and recreation services that they likely enjoy. If the vacant unincorporated areas are eventually detached from the CSA, the legal requirements for a subsidiary district with the Town of Moraga would be met.

In the event that the Town of Moraga were to annex these unincorporated residential areas in the future, then CSA R-4 could be dissolved entirely, and no subsidiary district would be needed.

Table 10-30: CSA R-4 SOI Analysis

Issue	Comments
SOI update recommendation	Adopt an SOI for CSA R-4 that includes the entire Town of Moraga and improved parcels to the southeast of the Town, but excludes vacant and unimproved areas located in unincorporated Contra Costa County.
Services provided	CSA R-4 provides additional funding to the Town of Moraga for parks and recreation services.
Present and planned land uses in the area	The CSA bounds encompass the majority of the incorporated Town of Moraga, and an unincorporated area to the southeast of the Town. The unincorporated area is primarily zoned as agricultural land with parcels of at least five acres and limited residential parcels of at least 15,000 to 20,000 square feet.
Projected growth in the District/Recommended SOI	Growth within in the CSA is anticipated to moderate with a projected growth rate of 10 percent within the Town between 2009 and 2025. Planned and proposed residential developments within the Town total over 650 dwelling units. Growth in the unincorporated areas of the CSA is

	projected to be low, as the area is outside of the countywide urban limit line.
Present and probable need for public facilities and services in the area	There is a present and probable need for parks and recreation services provided by the CSA, especially at Rancho Laguna Park. The Town reported that this park has experienced the most significant increase in service demand, and it is the park in the closest proximity to the unincorporated residential areas immediately adjacent to the town boundaries.
Opportunity for infill development rather than SOI expansion	Because the residential unincorporated areas are located outside of the countywide urban limit line, future development will occur as infill within the Town of Moraga.
Service capacity and adequacy	The Town of Moraga, and consequently CSA R-4, is slightly deficient in the amount of developed parkland and neighborhood parkland available to residents. To meet the Town's General Plan standard, the Town must acquire an additional 7.8 acres of developed parkland, or at least 7.4 acres of neighborhood parkland.
Social or economic communities of interest	The primary community of interest is the Town of Moraga, and the residents of the unincorporated area located to the southeast of the town boundaries.
Effects on other agencies	An SOI reduction for CSA R-4 would have no effect on other agencies; however, the eventual detachment of the vacant unincorporated areas of the CSA would reduce the amount of property tax available to the Town of Moraga for parks and recreation programs.
Potential for consolidations or other reorganizations when boundaries divide communities	There is no potential for consolidation at this time. If the vacant unincorporated areas to the southeast of the Town are eventually detached from the CSA, the legal requirements for a subsidiary district with the Town of Moraga would be met, and could be initiated by LAFCO. If the Town of Moraga were to annex the residential parcels located in the unincorporated area of the CSA, then CSA R-4 could be dissolved entirely.
Location of facilities, infrastructure and natural features	Park and recreation facilities maintained by the Town of Moraga (partly through funding provided by CSA R-4) are located throughout the Town of Moraga. The primary park facility used by residents of the unincorporated areas within the CSA is the Rancho Laguna Park, located in the most southeastern portion of the Town of Moraga. The CSA R-4 area is situated on the eastern face of the Berkeley Hills.
Willingness to serve	The Town of Moraga will continue to provide park and recreation services to the town boundary whether or not CSA R-4 is in existence.
Potential effects on agricultural and open space lands	No potential effects on agricultural or open space lands were identified.
Potential environmental impacts	Although no potential environmental impacts were identified in the MSR, the LAFCO counsel and planner should make CEQA determinations.

11. ALAMO-LAFAYETTE CEMETERY DISTRICT

Alamo-Lafayette Cemetery District (ALCD) provides cemetery services including interment, grounds maintenance and record upkeep to portions of the cities of Lafayette, Walnut Creek, San Ramon, the Town of Danville, and to the unincorporated communities of Alamo, Blackhawk, Diablo, and a portion of the unincorporated community of Walden.

AGENCY OVERVIEW

FORMATION AND BOUNDARY

ALCD was formed on April 5, 1937 as an independent special district. The District was formed to provide cemetery operations and maintenance services to an area in the southwest of Contra Costa County, including the incorporated City of Walnut Creek, and the unincorporated communities of Lafayette, Danville, San Ramon, Alamo, Blackhawk Ranch and Diablo.[215]

The principal act that governs the district is Public Cemetery District Law.[216] The principal act authorizes the district to own, operate, improve, and maintain cemeteries, provide interment services within its boundaries, and to sell interment accessories and replacement objects (e.g., burial vaults, liners, and flower vases). Although the district may require and regulate monuments or markers, it is precluded from selling them. The principal act requires the district to maintain cemeteries owned by the district.[217] The law allows the district to inter non-residents under certain circumstances.[218] Districts must apply and obtain LAFCO approval to exercise latent powers or, in other words, those services authorized by the principal act but not provided by the district at the end of 2000.[219]

[215] In 1937 the only incorporated city within the District was Walnut Creek. The City of Lafayette was incorporated in 1968, the Town of Danville was incorporated in 1982 and the City of San Ramon was incorporated in 1983. ALCD reported that the district was formed according to the boundaries of the Lafayette, Walnut Creek and Danville Unified School Districts at the time.

[216] California Health and Safety Code §9000-9093.

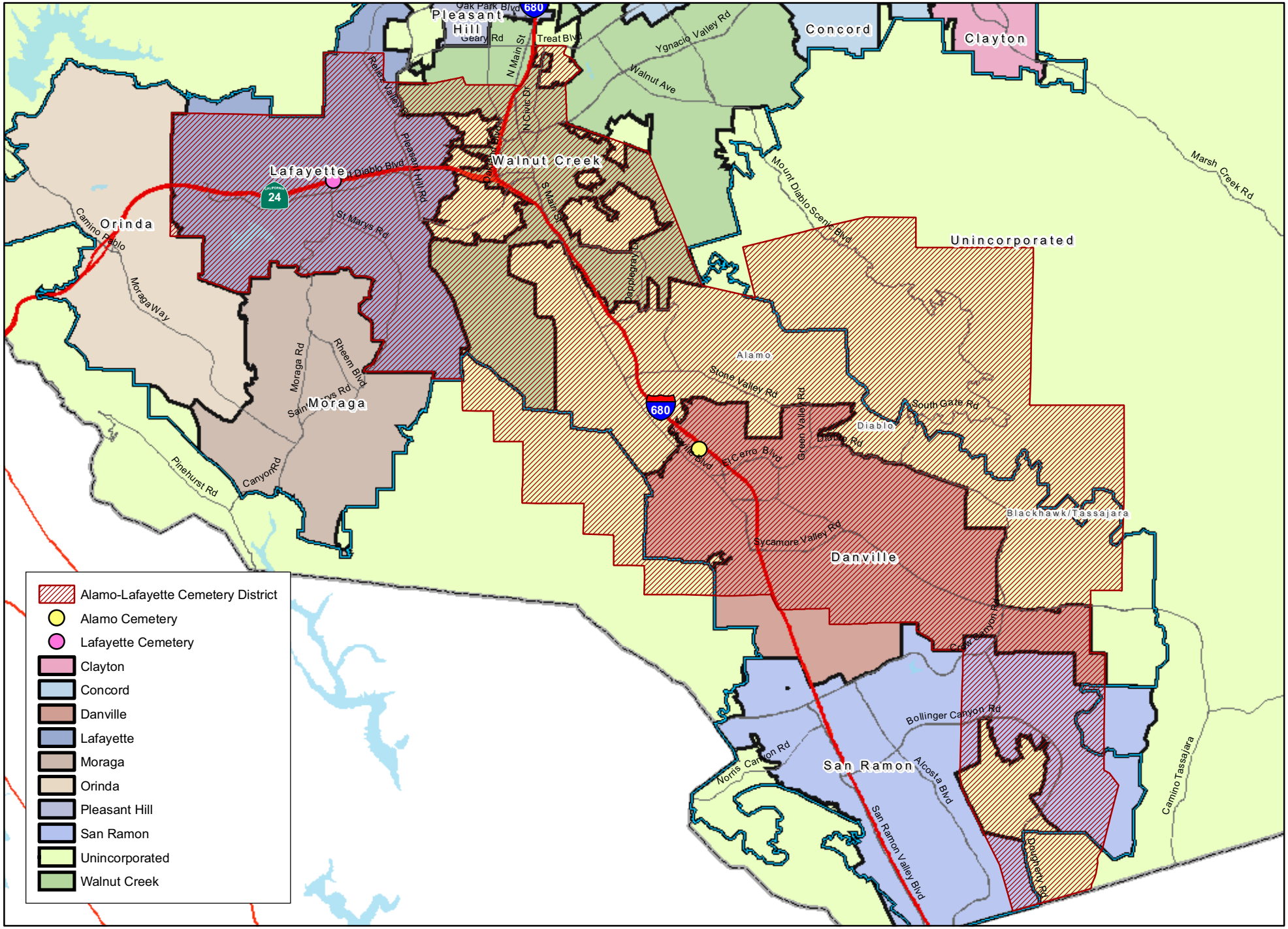
[217] California Health and Safety Code §9040.

[218] Non-residents eligible for interment are described in California Health and Safety Code §9061, and include former residents, current and former taxpayers, family members of residents and former residents, family members of those already buried in the cemetery, those without other cemetery alternatives within 15 miles of their residence, and those who died while serving in the military.

[219] Government Code §56824.10.

Map 11-1

Alamo-Lafayette Cemetery District and Coterminous SOI



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0 1 2 4 Miles

The District's boundary is located entirely within Contra Costa County. The District includes portions of various incorporated areas, including the southwestern portion of the City of Walnut Creek, the majority of the City of Lafayette and the Town of Danville, the eastern portion of the City of San Ramon, and the unincorporated communities of Alamo, Blackhawk and Diablo, and a portion of the unincorporated community of Walden (south of Treat Boulevard in the Contra Costa Centre area), as shown in Map 11-1.[220] The District also includes approximately 21 acres (consisting of 25 parcels) of the City of Orinda, south of SR 24, in the westernmost portion of the District. The District boundaries encompass approximately 84 square miles. Contra Costa is the principal county and Contra Costa LAFCO has jurisdiction.

The existing SOI for the District was most recently affirmed by LAFCO in 2004 and is coterminous with District boundaries.

Boundary History

There has only been a single boundary action for the District since formation in 1937. The 1973 Lafayette-Moraga Reorganization detached three parcels totaling approximately 109 acres, and annexed four parcels totaling approximately 397 acres. All seven parcels were located in the western portion of the District, adjacent to the Town of Moraga.[221]

LOCAL ACCOUNTABILITY AND GOVERNANCE

The District is governed by a three-member board. There had been a vacancy on the board for approximately one year; however, the vacancy was filled in December 2009. Board members are appointed by the County Board of Supervisors to staggered four-year terms. ALCD board members receive compensation of $100 per meeting, limited to a maximum of four meetings per month.

Constituent outreach activities performed by the District are limited to posting of agendas outside of the District office at least three business days prior to a meeting. The District reported that it sometimes sends notices to churches for outreach, but generally the District does not have sufficient funds to do special mailings. Minutes are distributed by request.

With regard to customer service, complaints may be filed in writing to the Board of Trustees. Within FY 08-09 there was one complaint filed, regarding placement of an unapproved headstone. The complaint was resolved by replacing the headstone with a smaller, approved headstone.

The District demonstrated full accountability in its disclosure of information and cooperation with LAFCO. The agency responded to LAFCO's written questionnaires and cooperated with LAFCO interview and document requests.

[220] Two areas in the northern portion of the City of Lafayette are not included within ALCD bounds, in addition to the southwestern portion of the Town of Danville.

[221] Approved by LAFCO on December 6, 1972, and recorded on March 19, 1973.

Table 11-1: ALCD Governing Body

Alamo-Lafayette Cemtery District				
Governing Body				
Members	**Name**	**Position**	**Began Serving**	**Term Expires**
	Nancy J. Flood	Trustee	2006	2010
	Primo E. Facchini	Trustee	1977	2010
	Carolyn Theissen	Trustee	2009	2012
Manner of Selection	Appointment by the Board of Supervisors			
Length of Term	Four years from the date of appointment			
Meetings	Date: Second Monday of the month at 4:00 p.m.		Location: 3285 Mt. Diablo Blvd., Lafayette, CA 94549	
Agenda Distribution	Posted at district office on cemetery grounds			
Minutes Distribution	By request			
Contact				
Contact	General Manager			
Mailing Address	P.O. Box 1955, Lafayette, CA 94549			
Physical Address	3285 Mt. Diablo Blvd., Lafayette, CA 94549			
Email/ Website	alcdist@pacbell.net			

SERVICE DEMAND AND GROWTH

The District encompasses a variety of land uses and business activities, as it includes the majority of the City of Lafayette and the Town of Danville, portions of the cities of Walnut Creek and San Ramon, in addition to the unincorporated communities of Alamo, Blackhawk and Diablo, and a portion of the unincorporated community of Walden.

The District considers its constituent base to be residents of the District, which LAFCO estimates is approximately 162,700. The District's population density was 1,937 per square mile, compared with the 2009 countywide density of 1,473. The area experienced modest growth from 2000 to 2009, and the District does not anticipate significant changes in service demand in the future due to growth, and did not identify any growth concerns.

Recent population growth within the District has been most dramatic in the Dougherty Valley Specific Plan (DVSP) area of the City of San Ramon. The DVSP area is approximately 6,000 acres in the eastern portion of the City, consisting of 11,000 residential dwelling units, 54 acres of commercial and mixed-use space, and 3,200 acres of open space.[222] Approximately 70 percent of the residential units within the DVSP had already been permitted as of the drafting of this report.[223]

Population growth in the cities of Lafayette, Danville and Walnut Creek is projected to be low (less than one percent annual growth) over the next 10 years, consistent with other cities in central

[222] Contra Costa County, *Dougherty Valley Specific Plan*, 2006, p. 4-6.

[223] Interview with Cindy Yee, Associate Planner, City of San Ramon, December 7, 2009.

Contra Costa County.[224] There are minor commercial developments planned within the City of Walnut Creek, but no new significant residential developments are planned. New residential development in all three cities is currently limited to infill; however, both the Town of Danville and the City of San Ramon are currently preparing General Plan updates.

In unincorporated Contra Costa County, the communities of Alamo and Walden are largely built-out, and population growth for these areas is anticipated to be low. A portion of the Blackhawk and Diablo communities are within the countywide urban limit line; there are no major planned projects in these areas, but some minor low-density residential development has occurred in recent years.[225]

The District is not a land use authority, and does not hold primary responsibility for implementing growth strategies.

MANAGEMENT

The District employs a General Manager/Superintendent, an Assistant Superintendent and two maintenance workers. The maintenance workers report to the General Manager/Superintendent, and the General Manager/Superintendent and Assistant Superintendent report to the Board at monthly meetings. The District evaluates employee performance on an annual basis. Workload monitoring is conducted on a routine basis by the General Manager/Superintendent, and by the Board of Trustees through safety meetings, annual reports, sales updates and grounds updates at monthly board meetings. The District compares its fees to other nearby private cemetery providers roughly every six months, and updates fees every 2-3 years.

The District reported that it annually prepares audited financial statements. The most recent audited financial statement provided to LAFCO by the District was for FY 07-08.

District planning efforts are limited to the adoption of an annual budget. The District does not have a written capital improvement plan, but reported that future needs are continually discussed at board meetings. Although the District plans for expenditures on a year-to-year basis through the adopted budget, no significant capital improvement projects have been undertaken in recent years due to a lack of financing. The District has levied an endowment fee on new interments since 1985; however, the first burial at Lafayette Cemetery was in 1854 and 1856 for the Alamo Cemetery. The District has not conducted a formal review of the adequacy of the endowment care fund to determine if the fund balance will be enough to provide perpetual care to the cemetery facilities.[226] The District has accommodated for short-term capacity issues by adding new cremation niches at both the Alamo and Lafayette cemeteries; however, the District did not indicate any long-term plan for acquiring and developing new cemetery facilities.

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[224] Contra Costa LAFCO, *Central County Sub-Regional MSR*, 2009, p. X-31.

[225] Contra Costa County, *General Plan: Housing Element*, 2002, p. 6-63.

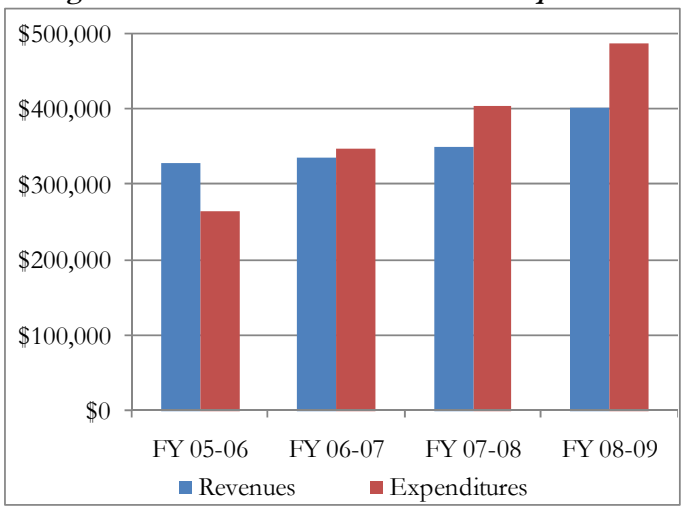
[226] The District reported that determining the adequacy of the endowment care fund is impractical. Because the endowment care fund obligation was only established in 1985, there is no money to maintain older interment sites. The amount needed to charge present customers for perpetual care of the entire cemetery (including pre-1985 graves) would be prohibitively high.

The District reported that it determines residency for interment purposes by consulting a Board of Equalization map showing the parcels within the District; however, this map was found to be inconsistent with the LAFCO map in the area of the unincorporated community of Walden. Hence, a recommendation of this MSR is for the District to collaborate with LAFCO staff and County GIS to verify that the appropriate District boundary is being used to determine residency.

The District reported that there have been no safety violations, accidents or workers compensation claims against the District in recent history. ALCD belongs to the Special Districts Risk Management Authority through the California Special Districts Association.

FINANCING

Figure 11-1 ALCD Revenues and Expenditures



The District's financial ability to provide services is constrained by available revenues and legal constraints on revenues. The MSR found the District provides adequate service levels despite financing constraints.

The District received $350,600 in revenues in FY 07-08.[227] The District's two main revenue streams are property taxes and service fees, consisting of 63 percent and 32 percent of revenues in FY 07-08, respectively. Revenues from charges for service were $111,664 in FY 07-08. Total expenditures for FY 07-08 were approximately $402,900, 56 percent of which were for salaries and contract employee compensation, 16 percent for operating expenses, 14 percent for utilities and office expenses, and 13 percent for insurance, taxes and professional services.

The District's undesignated fund balance at the end of FY 07-08 was $100,474. This amounted to 25 percent of the District's expenses in FY 07-08. The District has no formal policy on financial reserves.

ALCD had no long-term debt at the end of FY 07-08.

According to the Health and Safety Code §8725, cemetery authorities must establish, operate and maintain an endowment care fund. Fund monies are received through sale of interment rights and must be placed in a trust account for perpetual care of the cemetery. The principal must be invested, and only the income from the investment may be used for care, maintenance and embellishment of the cemetery. In FY 07-08, ALCD earned $14,561 from endowment fees and approximately $15,200 from interest income, yielding a fund balance of $365,475 in the endowment

[227] FY 07-08 was the most recent year that audited financial statements were available for, and are used in analysis for the purpose of accuracy. FY 08-09 revenues and expenditures shown in Figure 11-1 are unaudited.

care fund. The District has not yet determined the endowment care fund balance needed to provide for perpetual care of the cemetery facilities.

Table 11-2: ALCD Service Fees

In-Ground Burial	
Regular Lot	$2,200
Endowment Fee	$350
Open/Close	$650
Liner	$750
Total	**$3,950**
Saturday	$750
Sunday/Holiday	$1,550
Non-resident	$600
Partial non-resident	$350
Niche	
Single Niche	$800
Endowment Fee	$200
Open/Close	$200
Total	**$1,200**
Saturday	$300
Sunday/Holiday	$500
Non-resident	$600
Partial non-resident	$350

Table 11-2 shows the plot and endowment fees charged by ALCD for a full body in-ground burial, and a single cremation niche. For District residents, ALCD charges $3,950 for in-ground burial and $1,200 for a niche with weekday services. The District charges an additional fee for services performed on a Saturday, or on a Sunday or holiday.

When serving non-residents under Health and Safety Code §9061, the District assesses a non-resident fee of $600, or a partial non-resident fee of $350 for individuals who were previously District residents, but have since moved from the District. The non-resident and partial non-resident fees are the same no matter what type of service (regular in-ground burial, in-ground cremains burial, single niche, or double niche) is provided.

CEMETERY SERVICE

NATURE AND EXTENT

ALCD provides interment, grave maintenance and record upkeep services. Interment services offered by the District include in-ground burial, cremation burial and niches. The District also performs opening and closing of all interments. Routine cemetery maintenance activities are performed by the District year-round.

Table 11-3: ALCD Service Demand, FY 05-06 to FY 08-09

	Regular Interments	Cremation Interments	Niches	Total
Lafayette Cemetery				
FY 05-06	21	12	7	40
FY 06-07	21	13	1	35
FY 07-08	18	20	1	39
FY 08-09	27	24	4	55
Alamo Cemetery				
FY 05-06	3	13	14	30
FY 06-07	2	11	12	25
FY 07-08	7	14	12	33
FY 08-09	3	5	11	19
Totals	**102**	**112**	**62**	**276**

Table 11-3 shows the number of regular interments, cremation interments and niche placements from FY 05-06 to FY 08-09 for ALCD. Over the four year span at the two cemeteries, ALCD conducted 276 services, including 102 regular (full body) interments, 112 cremation interments and 62 urns placed into niches.

LOCATION

The District is authorized to provide burial plots and niches to residents and certain non-residents, as described in the Principal Act. Higher fees for service are charged to non-residents.

ALCD provides cemetery services to the Alamo Cemetery and the Lafayette Cemetery. The Alamo Cemetery is located at 130 El Portal, in the Town of Danville, and the Lafayette Cemetery is located at 3285 Mount Diablo Boulevard, in the City of Lafayette. Both the Lafayette Cemetery and Alamo Cemetery are open to the public from sunrise to sundown every day of the year. There are no other public cemetery facilities nearby; however, private cemeteries include Oakmont Memorial Park, Queen of Heaven Cemetery, Sinai Memorial Garden, and Memorial Gardens Concord.

INFRASTRUCTURE

The District's key infrastructure consists of the two cemetery facilities, the District office, and maintenance equipment and vehicles. Equipment owned by the District includes a backhoe, a truck with a lift bed, a casket lowering device, a jackhammer and tamper, and other miscellaneous landscaping and grave digging equipment. The District reported that the District office and related facilities, located at the Lafayette Cemetery, are in fair to good condition.

The Alamo Cemetery, originally opened in 1856, is approximately three acres in size. There are approximately 1,400 occupied plots at the cemetery. The District reported that the facility is generally in good condition. The cemetery has reached capacity for in-ground burials, and no new full plots are available at the cemetery; however, niches are available at the cemetery for cremated remains. As of November 2009, there were 18 available niches at the cemetery. The District plans to add up to 370 new niches at the cemetery in FY 09-10.[228]

The Lafayette Cemetery, originally opened in 1854, is approximately 5 acres in size. There are approximately 2,200 occupied plots at the cemetery. The District reported that the facility is generally in good condition. As of November 2009, the cemetery had approximately 500 regular plots available for purchase, and 12 niches. The District plans to add an additional 160 new niches at the cemetery in FY 09-10. Each niche can accommodate up to two urns.

In terms of infrastructure needs, the District reported that the pathways at both cemeteries are in need of rehabilitation, and that this work had been deferred in recent years due to financing constraints.

The District did not identify any current or future opportunities for facility sharing with another service provider.

[228] As of April 2010, ALCD reported that it planned to begin construction of the additional niches at Lafayette Cemetery and Alamo Cemetery in June 2010.

Figure 11-2 Lafayette Cemetery

GOVERNANCE ALTERNATIVES

The District reported that determining residency of prospective customers can be difficult and time-consuming, due to the outdated and illogical boundaries of the district. In addition, the District reported that it is sometimes in the unfortunate position of having to explain why one individual is considered a District resident and eligible for interment, yet a neighbor across the street (in the same city) is not a resident, and therefore not eligible for interment. Also, the Board of Equalization map that the District has historically used to determine residency was found to be inaccurate in the area where the unincorporated community of Walden/Contra Costa Centre borders the City of Walnut Creek. The District indicated that it would be desirable if the entire incorporated boundaries of Lafayette, Walnut Creek, Danville and San Ramon were included within the District, in addition to the entire unincorporated community of Walden/Contra Costa Centre, in order to streamline the process of determining residency and improve local accountability to its residents. In addition, approximately 21 acres (consisting of roughly 25 residential parcels) located in the City of Orinda are included within the ALCD boundary, in the westernmost portion of the District. These areas were included within the boundary of the District at formation, and were not detached from the District upon incorporation of the City of Orinda. The District reported that it is illogical why only a handful of parcels within a City would be within the ALCD boundary.

Despite the benefits of a logical boundary, annexation of these areas to the district poses a potential challenge due to property tax considerations. As a result of limitations imposed by Proposition 13, in order for the District to receive property tax from the annexed areas, a property tax transfer agreement would have to be reached between the District and other local agencies. If a property tax transfer agreement could not be reached, ALCD would not receive property tax revenue from the annexed areas, and would likely not be able to extend the same fees for service to these areas. Health and Safety Code §9090 et seq. allows districts to form zones, meaning the lack of property taxes could be offset by higher fees for service in those areas (i.e., zones), but the cost may be prohibitively high for some customers. Alternatively, the District may determine that it does not have the short-term capacity to provide cemetery services to a significantly larger area, or a sufficient endowment fund balance to fund cemetery maintenance activities.

AGENCY MSR DETERMINATIONS

GROWTH AND POPULATION PROJECTIONS

1) LAFCO estimates that the residential population within the district is approximately 162,700. Recent growth has been low in the unincorporated areas and the cities of Lafayette, Danville and Walnut Creek, and relatively high in the City of San Ramon.
2) Recent population growth within the District has been most dramatic in the Dougherty Valley Specific Plan (DVSP) area of the City of San Ramon. The DVSP area is approximately 6,000 acres in the eastern portion of the City, consisting of 11,000 residential dwelling units, 54 acres of commercial and mixed-use space, and 3,200 acres of open space.

3) Population growth in the cities of Lafayette, Danville and Walnut Creek, and the unincorporated communities, is projected to be low (less than one percent annual growth) over the next 10 years, consistent with other areas of central Contra Costa County. Build-out of the DVSP area will ultimately yield a total of over 28,600 residents; however, approximately 70 percent of the residential units in the DVSP area had already been permitted as of the drafting of this report.

PRESENT AND PLANNED CAPACITY OF PUBLIC FACILITIES AND ADEQUACY OF PUBLIC SERVICES, INCLUDING INFRASTRUCTURE NEEDS AND DEFICIENCIES

4) No significant capacity issues were identified for ALCD, assuming that planned additions of niches are completed timely. The Lafayette Cemetery has approximately 500 full plots available for purchase, and the District plans to add 160 niches to the cemetery in FY 09-10. The Alamo Cemetery has reached capacity for full burials, and has approximately one to two years of existing capacity in niches; however, the District plans to add 370 niches at the cemetery in FY 09-10.

5) The District currently provides adequate services given constrained financing; however, the District reported that it lacks the financial ability to expand or acquire new facilities, and thus may be unable to serve current and future taxpayers.

6) ALCD provides cemetery maintenance on a year-round basis. The District spends approximately $23,000 per acre on cemetery maintenance.

7) The District reported that a significant service challenge is determining residency of prospective customers due to the illogical boundaries of the District.

8) Infrastructure needs for the district include the rehabilitation of walking paths at both the Alamo Cemetery and Lafayette Cemetery.

9) The District does not have a capital improvement plan. A written multi-year planning document could help the District plan capital expenditures, and would improve accountability.

FINANCIAL ABILITY OF AGENCIES TO PROVIDE SERVICES

10) The District reported that the current level of financing is minimally sufficient for adequate service provision; however, the District does not appear to have the financial ability to provide long-term services. ALCD reported that it currently lacks the financial ability to expand or acquire new facilities.

11) The District is currently participating in the Proposition 1A Securitization Program, to mitigate the impact of the loss of property tax revenues borrowed by the State.

12) Some capital needs have not been addressed in recent years due to financing constraints.

13) ALCD indicated that their endowment care fees are too low to cover long-term maintenance of existing plots. It is recommended that ALCD conduct a formal review of the adequacy of

the endowment care fund to determine if the fund balance will be enough to provide perpetual care to the cemetery facilities once they have reached capacity and adopt appropriate and prudent fees.[229]

STATUS OF, AND OPPORTUNITIES FOR, SHARED FACILITIES

14) The Agency does not practice significant facility sharing, and did not identify any potential facility sharing opportunities.

ACCOUNTABILITY FOR COMMUNITY SERVICE NEEDS, INCLUDING GOVERNMENTAL STRUCTURE AND OPERATIONAL EFFICIENCIES

15) The District reported that it determines residency for interment purposes by consulting a Board of Equalization map showing the Tax Rate Areas within the District; however, this map was found to be inconsistent with the LAFCO map in the area of the unincorporated community of Walden. Hence, a recommendation of this MSR is for the District to collaborate with LAFCO staff and County GIS to verify that the appropriate District boundary is being used to determine residency.

16) Accountability is somewhat constrained by limited interest in serving on the governing body, as indicated by the recent extended vacancy on the Board.

17) The District demonstrated accountability and transparency by disclosing financial and service related information in response to LAFCO requests.

18) The District does not conduct any significant community outreach or involvement activities.

SOI RECOMMENDATIONS AND DETERMINATIONS

The existing SOI for the district is coterminous with its bounds. The SOI for the district was affirmed by LAFCO in 2004.

AGENCY PROPOSAL

The District indicated a desire for an SOI expansion to include the portions of the cities of Lafayette, Walnut Creek, Danville and San Ramon, and the portion of the unincorporated community of Walden/Contra Costa Centre, that extend beyond the boundary of the District, and an SOI reduction to exclude the portion of the City of Orinda currently within the district, in order to create a more logical boundary. The District indicated that it would be very interested in pursuing boundary changes that would streamline the process of determining residency.

[229] However, the District reported that determining the adequacy of the endowment care fund is impractical. Because the endowment care fund obligation was only established in 1985, there is no money to maintain older interment sites. The amount needed to charge present customers for perpetual care of the entire cemetery (including pre-1985 graves) would be prohibitively high.

SOI OPTIONS

Given the considerations addressed in the Municipal Service Review, three options are identified for the ALCD SOI:

SOI Option #1 – Retain existing coterminous SOI

If LAFCO determines that the existing government structure is appropriate, then the existing SOI should be retained. This option would continue to exclude portions of the cities Lafayette, Walnut Creek, Danville and San Ramon, and the unincorporated community of Walden/Contra Costa Centre, from the SOI of the District.

SOI Option #2 – Expand to include entire city and community bounds

Expanding the SOI to include the entire boundaries of the incorporated and unincorporated areas within the District would increase efficiency by streamlining the District's process of determining residency and create a more logical agency boundary.

SOI Option #3 – Reduce SOI to exclude 21 acres of City of Orinda

Approximately 21 acres (consisting of 25 residential parcels) located in the City of Orinda are included within the ALCD boundary, in the westernmost portion of the District. Reducing the SOI to exclude these parcels would signify that LAFCO anticipates that these parcels will be detached from the District.

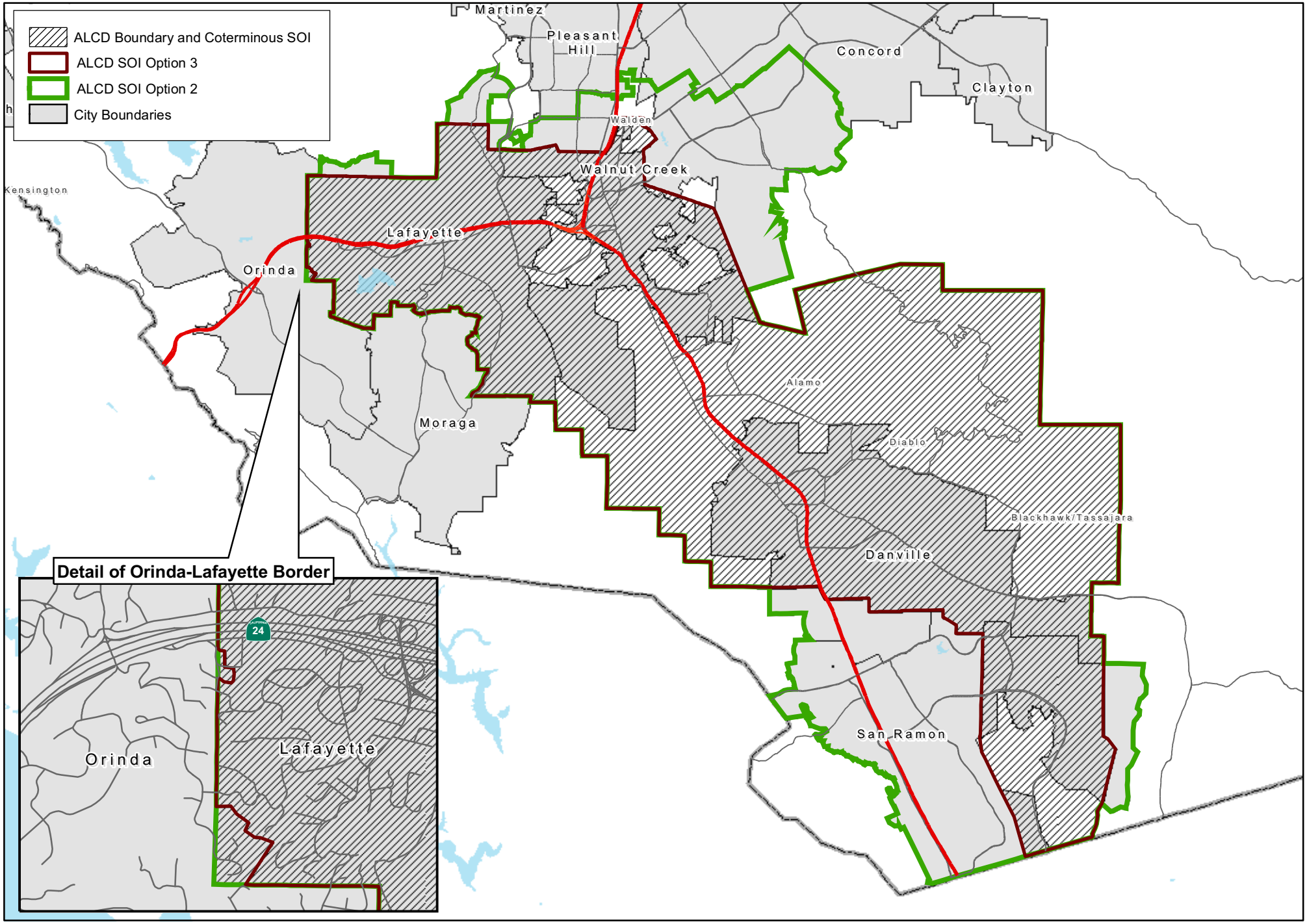
RECOMMENDATION

A more logical boundary for ALCD would clearly improve local accountability, and would likely improve the District's process for determining residency. The SOI amendment to signify such a logical boundary would expand the SOI to include the entirety of the cities of Lafayette, Walnut Creek, San Ramon, and the Town of Danville, and the unincorporated Walden/Contra Costa Centre area and the unincorporated island within Walnut Creek, and would reduce the SOI by approximately 21 acres in the City of Orinda.

However, before such an SOI amendment can be recommended, the District must determine (a) whether a property tax transfer agreement could be reached with the various cities and county; (b) what fee for service would have to be charged in the zones of the district not contributing property tax to sufficiently offset the foregone revenue if no property tax transfer agreement can be reached; and (c) whether the District has sufficient short-term capacity to accommodate a significantly larger service area with or without additional property tax. Furthermore, LAFCO may wish to require that the District conduct a formal study as to the adequacy of the endowment care fee, and the necessary endowment fund balance to ensure perpetual care of the cemetery facilities and adopt appropriate and prudent fees, before an SOI amendment is approved.

Map 11-2

Alamo-Lafayette Cemetery District SOI Options Two and Three



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0 1 2 4 Miles

LAFCO may also wish that the district give further consideration to how the 25 property owners in the City of Orinda would be impacted by being detached from ALCD. Detaching the 25 parcels within the City of Orinda from ALCD would result in a loss of approximately $105 in property tax revenue per year, based on FY 07-08 allocations.[230]

Lastly, it is recommended that the District collaborate with LAFCO staff and County GIS to verify that the appropriate district boundary is being used to determine residency. If a property tax transfer agreement is not reached, and zones are created within the District for areas not paying property tax, the process of determining residency in the future will be no simpler than it is now without improved mapping resources.

Table 11-4: ALCD SOI Analysis

Issue	Comments
SOI update recommendation	SOI expansion to include incorporated and unincorporated areas that extend outside of the District, pending property tax transfer and fee study materials, and capacity study submitted to LAFCO by District.
Services provided	ALCD provides interment, grave maintenance and record upkeep services to the Lafayette Cemetery and the Alamo Cemetery.
Present and planned land uses in the area	The District encompasses a variety of land uses and business activities, as it includes the majority of the City of Lafayette and the Town of Danville, portions of the cities of Walnut Creek and San Ramon, in addition to the unincorporated communities of Alamo, Blackhawk and Diablo, and a portion of the community of Walden. No significantly new land uses are planned within the District.
Projected growth in the District/Recommended SOI	Projected growth within the District is projected to be low (less than one percent annual growth) over the next 10 years, consistent with other areas of central Contra Costa County. Build-out of the DVSP area will ultimately yield a total of over 28,600 residents; however, approximately 70 percent of the residential units in the DVSP area had already been permitted as of the drafting of this report.
Present and probable need for public facilities and services in the area	There is a present and probable need for maintenance of the Alamo Cemetery and Lafayette Cemetery for the foreseeable future.
Opportunity for infill development rather than SOI expansion	Opportunity for infill development is not relevant to the SOI for ALCD.
Service capacity and adequacy	No short-term capacity issues were identified for ALCD. Assuming that planned additions of niches are completed in FY 09-10, the District has approximately 15-20 years of existing capacity based on recent interment rates. The Alamo Cemetery has reached capacity for in-ground burials; however, the District plans to add 370 additional niches in FY 09-10. The Lafayette Cemetery has approximately 500 full-body plots remaining, and

[230] In FY 07-08, the City of Orinda Tax Rate Areas within ALCD paid $102.28 (TRA 18037) and $2.48 (TRA 18034) in property taxes to ALCD.

	the District plans to add 160 niches in FY 09-10.
Social or economic communities of interest	Social and economic communities of interest include the City of Lafayette, the City of Walnut Creek, the Town of Danville, the City of San Ramon, and the unincorporated communities of Alamo, Diablo, Blackhawk, and Walden.
Effects on other agencies	The recommended SOI update would impact other agencies by requiring a property tax transfer agreement with ALCD. If no property tax transfer agreement is reached, there would be no impact on other agencies.
Potential for consolidations or other reorganizations when boundaries divide communities	There were no potential consolidation opportunities identified by the MSR.
Location of facilities, infrastructure and natural features	The Alamo Cemetery is located at 130 El Portal, in the Town of Danville, and the Lafayette Cemetery is located at 3285 Mount Diablo Boulevard, in the City of Lafayette. The District office and related facilities are located at the Lafayette Cemetery.
Willingness to serve	The District indicated a willingness to continue to serve the aforementioned communities of interest and the Alamo and Lafayette cemeteries.
Potential effects on agricultural and open space lands	No potential effects on agricultural or open space lands were identified.
Potential environmental impacts	Although no potential environmental impacts were identified in the MSR, the LAFCO counsel and planner should make CEQA determinations.

12. BYRON BRENTWOOD KNIGHTSEN UNION CEMETERY DISTRICT

Byron Brentwood Knightsen Union Cemetery District (BBKUCD) provides cemetery services including interment, grounds maintenance and record upkeep, to the unincorporated communities of Byron, Knightsen, Discovery Bay, Bethel Island, the eastern portion of Morgan Territory, the City of Brentwood, the eastern portion of the City of Oakley, and the Delta islands of Jersey, Bradford, Webb, Quimby, Holland, Palm, Orwood, and Coney.

AGENCY OVERVIEW

FORMATION AND BOUNDARY

BBKUCD was formed on June 5, 1928 as an independent special district. The District was formed to provide cemetery operations and maintenance services to the unincorporated communities of Brentwood, Byron and Knightsen.[231] Bethel Island, the eastern portion of Morgan Territory, and the Delta islands of Jersey, Bradford, Webb, Quimby, Holland, Palm, Orwood, and Coney were also included within the District at formation.

The principal act that governs the District is the Public Cemetery District Law.[232] The principal act authorizes the district to own, operate, improve, and maintain cemeteries, provide interment services within its boundaries, and to sell interment accessories and replacement objects (e.g., burial vaults, liners, and flower vases). Although the district may require and regulate monuments or markers, it is precluded from selling them. The principal act requires the district to maintain cemeteries owned by the district.[233] The law allows the district to inter non-residents under certain circumstances.[234] Districts must apply and obtain LAFCO approval to exercise latent powers or, in other words, those services authorized by the principal act but not provided by the district at the end of 2000.[235]

[231] The City of Brentwood incorporated in 1948.

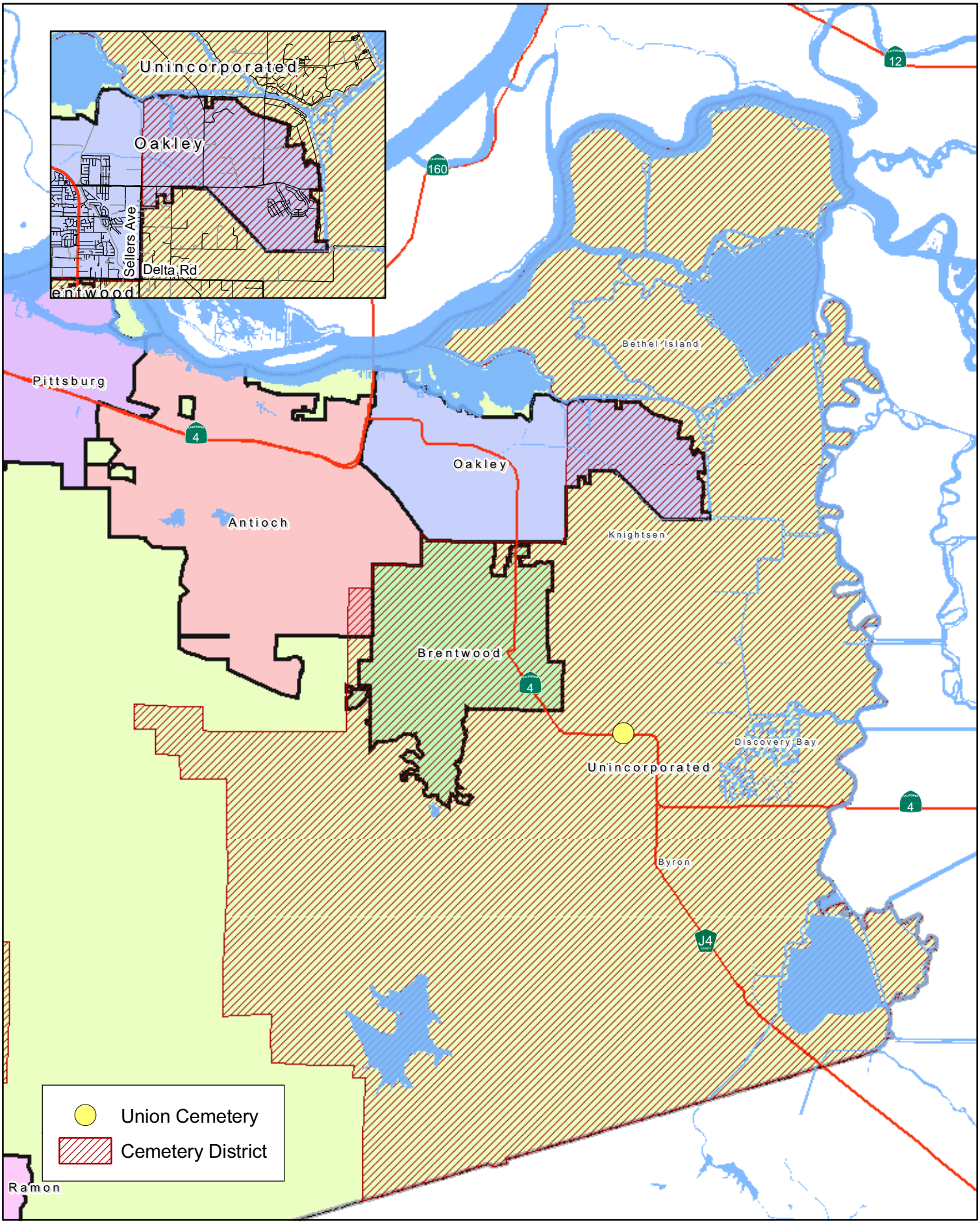
[232] California Health and Safety Code §9000-9093.

[233] California Health and Safety Code §9040.

[234] Non-residents eligible for interment are described in California Health and Safety Code §9061, and include former residents, current and former taxpayers, family members of residents and former residents, family members of those already buried in the cemetery, those without other cemetery alternatives within 15 miles of their residence, and those who died while serving in the military.

[235] Government Code §56824.10.

Map 12-1 Byron Brentwood Knightsen Union Cemetery District and Coterminous SOI



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The District's boundary is located entirely within Contra Costa County, extending from the Alameda County line in the south, to the Sacramento County line in the north, and to the San Joaquin County line in the east. The District includes the unincorporated communities of Byron, Knightsen, Discovery Bay, Bethel Island, the eastern portion of Morgan Territory, the City of Brentwood, the eastern portion of the City of Oakley (east of Sellers Avenue), a small portion of the City of Antioch, and various Delta islands, as shown in Map 12-1.[236] The boundaries encompass approximately 203 square miles. Contra Costa is the principal county and Contra Costa LAFCO has jurisdiction.

The existing SOI for the District was most recently affirmed by LAFCO in 2004 and is coterminous with district boundaries.

Boundary History

The only boundary change for the District occurred in 2002, consisting of a 316-acre annexation and corresponding SOI amendment to the District, in the northwestern portion of the City of Brentwood.[237] The area was annexed to BBKUCD in order to include the entire city limits of Brentwood within the District.[238] Although there was no property tax exchange agreement for this annexation, approximately 53 of the 63 parcels currently located in the annexed area pay property tax to the District.[239]

LOCAL ACCOUNTABILITY AND GOVERNANCE

The District is governed by a three-member board. Board members are appointed by the County Board of Supervisors to staggered four-year terms. BBKUCD board members do not receive per-meeting compensation, but are reimbursed for necessary expenses incurred on official business (other than a meeting of the Board).

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[236] There is also an approximately 0.5 square mile area of the southeastern portion of the City of Antioch within BBKUCD boundaries, containing approximately 35 residential parcels along Prewett Ranch Drive, and two large agricultural parcels containing Williamson Act land.

[237] LAFCO Resolution No. 02-16, recorded July 7, 2002.

[238] LAFCO Resolution No. 02-16 indicates that the affected Tax Rate Areas (TRAs) were 10092, 10093, 10094, and 10096.

[239] Per interview with Bobby Romero, Contra Costa County Auditor-Controller's Office, 1/22/2010. The County Auditor-Controller's Office reported that because TRA 10091 had the same mix of districts as TRA 10092 (with the exception of BBKUCD), when the annexation took place the County decided to consolidate TRAs 10091 and 10092 (with consolidation occurring in FY 04-05). For that reason, TRA 10092 no longer exists, and BBKUCD continues to receive property tax from 10091. The other parcels involved in the annexation that currently pay property tax to BBKUCD are located in TRA 10094. When the BBKUCD annexation originally became effective in FY 03-04 the District did not get a share of the one percent tax allocation in TRA 10094 because there was no property tax transfer agreement for the annexation; however, in FY 04-05 when the Kellogg Creek Annexation to Contra Costa Water District was processed, the County decided to consolidate TRAs by transferring CCWD from TRA 10092 (which was being consolidated with 10091) to TRA 10094, because it had the same mix of districts (with the exception of BBKUCD) as TRA 10091. The increment allocation factors were combined based on weighted averages by the property tax system, with the result being that BBKUCD received a small allocation in the distribution of the one percent tax increment in TRA 10094. Although BBKUCD includes TRAs 10093 and 10096 in its boundary, BBKUCD does not receive a share of the one percent property tax in these TRAs because there was no property tax exchange agreement for the annexation and no TRA consolidations have occurred.

Constituent outreach activities conducted by the District include dissemination of meeting agendas to media contacts and interested parties, notifications in local publications of the cemetery as a place of historical significance, and letters to the editor of local publications thanking volunteer groups or announcing changes. The District maintains a website with information about the District, services offered and contact information. The District is also part of the Brentwood Chamber of Commerce.

With regard to customer service, complaints may be filed with the District manager by phone, email, writing, or in person. In FY 08-09 there was one complaint filed, regarding landscaping and trimming around a particular headstone, which the District addressed immediately by performing the needed maintenance.

Table 12-1: BBKUCD Governing Body

Byron-Brentwood-Knightsen Union Cemetery District				
Governing Body				
Members	**Name**	**Position**	**Began Serving**	**Term Expires**
	Sharon Marsh	Trustee	2002	2010
	Barbara Guise	Trustee	2001	2011
	Greg Williams	Trustee	2004	2010
Manner of Selection	Appointment by the Board of Supervisors			
Length of Term	Four years from the date of appointment			
Meetings	Date: Third Wednesday of the month at 4:00 p.m.		Location: 11545 Brentwood Blvd., Brentwood, CA 94513	
Agenda Distribution	Posted at district office on cemetery grounds			
Minutes Distribution	By request			
Contact				
Contact	District Manager			
Mailing Address	P.O. Box 551, Brentwood, CA 94513			
Email/Website	ucemetery@yahoo.com, http://www.unioncemeterydistrict.com			

The District demonstrated full accountability in its disclosure of information and cooperation with LAFCO. The agency responded to LAFCO's written questionnaires and cooperated with LAFCO interview and document requests.

SERVICE DEMAND AND GROWTH

The District encompasses a variety of land uses and business activities, as it includes the City of Brentwood and the unincorporated community of Discovery Bay. Land uses in these areas consist primarily of suburban (low density) residential and commercial development. Other land uses in the unincorporated communities of Byron, Knightsen, and the eastern portion of the City of Oakley consist primarily of agricultural land; however, some single-family residential parcels are located throughout these areas, most heavily concentrated in the eastern portion of the City of Oakley at the Summer Lakes subdivision. The eastern Morgan Territory area is largely mountainous open space, but also includes the Los Vaqueros Reservoir and surrounding watershed. The Delta islands of Bethel, Jersey, Bradford, Webb, Quimby, Holland, Palm, Orwood, and Coney contain some scattered residential parcels, but primarily consist of agricultural, pasture and Delta recreation land uses.

The District considers its customer base to be residents of the District, which LAFCO estimates is approximately 75,000. The District's population density was 369 per square mile, compared with the 2009 countywide density of 1,473. The District experienced significant growth from 2000 to 2008, primarily in the City of Brentwood, which grew by 117 percent. The District anticipates that the recent population growth will eventually impact service demand, but likely not within the next 5-10 years. The District did not identify any specific growth concerns, but did report that it has been attempting to buy nearly 10 acres of adjacent land for the last three years, in order to accommodate expansion of the facility.[240]

The City of Brentwood was the fastest-growing part of the County in recent years, and is projected to continue to grow in the long-term. The City reported that it had 5,046 residential units and about 625,000 square feet of retail, office and industrial space approved for new development.[241] A portion of the potential 1,215-unit Ginocchio development project is in the Brentwood planning area, west of the city limits.

The eastern portion of the City of Oakley has also experienced significant recent growth, and future growth is anticipated within the City of Oakley's East Cypress Corridor Specific Plan area. Significant development projects include the recently completed Spinnaker Cove (12 units) and Mariner Estates (62 units) projects, and the 1,700-unit Summer Lakes North and South development that is currently under construction. The City of Oakley General Plan designates the East Cypress Corridor Specific Plan area for development of up to 5,763 residential dwelling units (including 544 existing residences), in addition to commercial, agricultural, recreation, and public facilities.[242]

Growth in the unincorporated areas includes Discovery Bay, Byron Airport, and Delta Coves in Bethel Island. Private Island Homes, a local developer, is proposing development of a master planned community on the 1,100 acre Cecchini Ranch property (just east of Discovery Bay) including 4,000 to 6,000 new residences. Delta Coves is a planned waterfront residential project (495 dwelling units) on Bethel Island that involves breaching the levee to construct a lagoon (similar to Summer Lakes in the City of Oakley). The Delta Coves project was scheduled to start construction in 2008 and be completed in 2010; however, the project has been delayed due to the slow economy. Also, the land around Byron airport allows for additional residential development as well as aviation easements if needed in the future.[243]

The County general plan calls for continued low-density, rural land uses in Knightsen. For the most part, the remainder of the unincorporated areas in BBKUCD is protected by the countywide urban limit.

The District is not a land use authority, and does not hold primary responsibility for implementing growth strategies.

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[240] As of January 2010 the District reported that it is no longer pursuing the purchase of this property, due to difficulties surrounding financing and the current real estate market.

[241] Contra Costa LAFCO, *Fire & EMS MSR*, 2009, p. 191.

[242] City of Oakley, *East Cypress Corridor Specific Plan*, 2006, p. 1.3.

[243] Contra Costa County, *General Plan*, 2002, p. 5-24.

MANAGEMENT

The District employs a manager, a secretary, a foreman, and one caretaker on a full-time basis. The District also employs one or two additional caretakers on a seasonal basis, from March to November. The district secretary and caretakers report to the district manager, who reports to the Board at monthly meetings. The District evaluates employee performance on an annual basis. Workload monitoring is conducted on a routine basis by the district manager, and by the Board of Trustees at monthly board meetings. The District compares its fees to those charged by the Holy Cross Cemetery on an annual basis, and updates the fees as necessary.

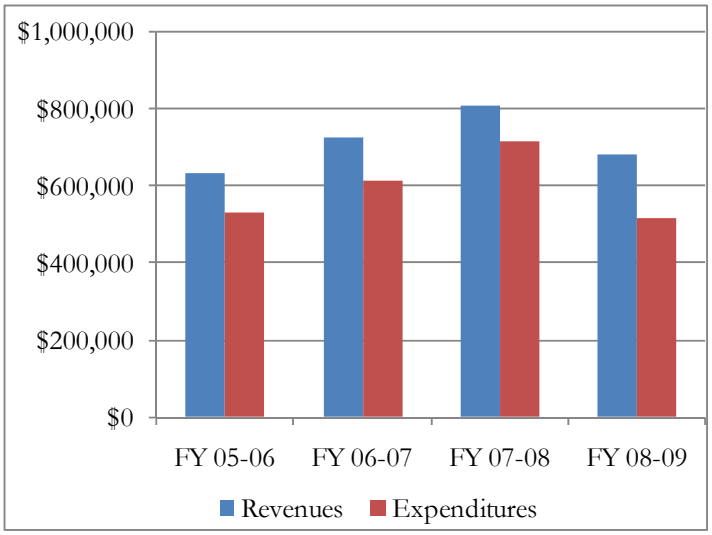
The District reported that it annually prepares audited financial statements. The most recent audited financial statement provided to LAFCO by the District was for FY 07-08.

District planning efforts are limited to the adoption of an annual budget. The District does not have a written capital improvement plan, but reported that next fiscal year it will begin tracking necessary capital expenses by line-item in the budget so funds will be available when needs arise. The District has not conducted a formal review of the adequacy of the endowment care fund to determine if the fund balance will be enough to provide perpetual care to the cemetery facilities.

The District reported that it determines residency for interment purposes by consulting a map of the district bounds provided by LAFCO; however, this map was found to be inconsistent with the LAFCO map depicted in this MSR in the area south of Brownstone Road, north of the City of Brentwood. Hence, a recommendation of this MSR is for the District to collaborate with LAFCO staff and County GIS to verify that the appropriate district boundary is being used to determine residency.

FINANCING

Figure 12-1 BBKUCD Revenues and Expenditures



The District's financial ability to provide services has improved in recent years, due to an increase in development and sale of new homes in eastern Contra Costa County. The amount of property tax revenue received by the District increased by 47 percent from FY 05-06 to FY 07-08.

The District received $809,300 in revenues in FY 07-08.[244] BBKUCD relies primarily on property taxes to fund services, consisting of 65 percent of revenues. Revenues from charges for service were $277,100 in FY 07-08,

[244] FY 07-08 was the most recent year that audited financial statements were available for, and are used in analysis for the purpose of accuracy. FY 08-09 revenues and expenditures shown in Figure 12-1 are unaudited.

consisting of 34 percent of total revenues.

Total expenditures for FY 07-08 were approximately $717,500, 54 percent of which were for wages, benefits and health insurance; 18 percent for operating expenses; 18 percent for capital expenses; seven percent for insurance, taxes and professional services; and three percent for utilities and office expenses.

The District's unreserved fund balance at the end of FY 07-08 was approximately $187,500. This amounted to 26 percent of the District's expenses in FY 07-08. The District has no formal policy on financial reserves. The District reported that it trimmed spending for FY 08-09 by approximately $100,000, including laying off one full-time caretaker, due to concerns related to decreased property tax revenue.

BBKUCD had no long-term debt at the end of FY 07-08.

According to the Health and Safety Code §8725, cemetery authorities must establish, operate and maintain an endowment care fund. Fund monies are received through sale of cemetery property and land and must be placed in a trust account for perpetual care of the cemetery. The principal must be invested, and only the income from the investment may be used for care, maintenance and embellishment of the cemetery. In FY 07-08, BBKUCD earned $5,520 from endowment fees and approximately $6,670 from interest income, yielding a fund balance of $186,291 in the endowment care fund. The District has not yet determined the endowment care fund balance needed to provide for perpetual care of the cemetery facility.

BBKUCD also maintains a capital expenses reserve, a "Section F" upgrades reserve, and a pre-need trust reserve fund.[245] As of FY 07-08, the fund balance of the capital expense reserve was $248,000, $23,450 for the "Section F" reserve, and $312,980 for the pre-need trust reserve.

Table 12-2 shows the plot and endowment fees charged by BBKUCD for a full body in-ground burial, and a single cremation niche. For district residents with weekday services, BBKUCD charges between $2,775 and $4,135 for in-ground burials and between $1,253 and $1,453 for niches.

Table 12-2: BBKUCD Service Fees

In-Ground Burial		**Single Niche**	
Section D Lot	$1,375	Lower Tier Niche	$800
Section E Lot	$1,600	Middle Tier Niche	$900
Section F Lot	$2,710	Top Tier Niche	$1,000
Endowment Fee[1]	$160	Endowment Fee	$125
Open/Close	$1,045	Open/Close	$245
Handling of Liner	$195	Sales Tax	$83
Total (Section D)	**$2,775**	**Total (Lower Tier)**	**$1,253**
Total (Section E)	**$3,000**	**Total (Middle Tier)**	**$1,353**
Total (Section F)[1]	**$4,135**	**Total (Top Tier)**	**$1,453**
Burial Container		**Non-Resident Fees**	
Regular Liner	$568	Full Burial	$500
Regular Vault	$677	Cremation Burial	$75
Protected Vault	$1,082	Niche Interment	$85
Overtime Fees			
Saturday/Holiday	$375	Sunday	$700

Note:
(1) The endowment fee for Section F graves is $185.

[245] The capital expense reserve is dedicated to general expenses that are not directly associated with maintaining grave sites, and therefore, would not be eligible for endowment care funds. The "Section F" upgrades reserve is dedicated to insuring that there are sufficient funds to maintain Section F of the Union Cemetery, and is funded through a fee over and above the cost of each grave ($500) and cremation niche ($100) sold in that section. The pre-need trust reserve fund is used to hold the funds of families who have paid for burial rights at the Union Cemetery in advance.

An outer burial container is also required for full body, regular burials. The cost of a burial container ranges from $568 to $1,082, depending on the type of burial container required.

When serving non-residents under Health and Safety Code §9061, the District assesses a non-resident fee of $500 for an in-ground, full burial; $75 for an in-ground cremation burial; and $85 for a cremation niche interment.

The District also charges an overtime fee of $375 for services performed on a Saturday or holiday, or a fee of $700 for Sunday services.

CEMETERY SERVICE

NATURE AND EXTENT

Interment services offered by BBKUCD include in-ground burial, in-ground cremation burial, in-ground niches, columbarium niches, and a scattering garden for cremains. General services offered include pre-need sales and service, headstone setting, and memorial bench setting and memorial tree planting.[246] The District directly provides year-round preservation of burial plots and grounds maintenance. Infrastructure projects are typically performed by contract, as determined by the Board upon recommendation of the district manager.

Table 12-3: BBKUCD Service Demand, FY 05-06 to FY 08-09

	Regular Interments	Cremation Interments	Total
FY 05-06	43	30	73
FY 06-07	36	33	69
FY 07-08	47	31	78
FY 08-09	49	32	81
Total	**175**	**126**	**301**

Table 12-3 shows the number of regular interments and cremation interments from FY 05-06 to FY 08-09 for BBKUCD. Over the four-year span, the District conducted 301 services.[247] From FY 05-06 to FY 08-09 the District provided 175 regular (full body) interments and 126 cremation interments.[248] The District reported that as cremation has become an increasingly common alternative to full burial, the average amount of land being used annually has decreased.

LOCATION

The District is authorized to provide burial plots and niches to residents and certain non-residents, as described in the Principal Act. Higher fees for service are charged to non-residents.

[246] Pre-need sales offered by the District consist of a contract with a family or individual that allows the District to collect money "up front" and the family or individual to "lock in" current lot prices. The money is turned over to the Contra Costa County Treasurer's Office and is placed in an interest-bearing account. When the lots or services are needed for the burial of one of the persons on the contract, then the money is transferred from this escrow-like account to the District's General Fund for use.

[247] The District did not provide the individual number of regular interments and cremation interments for FY 08-09.

[248] The number of creation interments includes both in-ground cremation burial and niche placements. The District does not distinguish between the two services in its record keeping. The District also reported that

The Union Cemetery is located at 11545 Brentwood Boulevard, about half way between the City of Brentwood and the unincorporated community of Byron. The cemetery facility is open to the public daily from 8:00 a.m. until dusk. There are no other public cemetery facilities nearby; however, private cemeteries include Oakview Cemetery and Holy Cross Cemetery, located in the City of Antioch.

The District reported that approximately 25-30 percent of non-cremations are buried outside of the District, in the home area of the family of the deceased.

INFRASTRUCTURE

The District's key infrastructure includes the 18.5-acre cemetery facility (14.5 developed acres, two undeveloped acres and two acres in roads, buildings and other utilities). Equipment owned by the District includes a backhoe, two tractors with loaders, a special dump trailer, a casket lowering device, two utility tractors, three zero turn radius mowers, and two pickup trucks, and other miscellaneous landscaping and grave digging equipment. The District reported that the district office and related facilities, located at the Union Cemetery, are in good condition.

The District reported that the Union Cemetery, originally opened in 1878, is generally in good condition. The District has records of 6,010 occupied plots at the cemetery.[249] As of November 2009, the cemetery had approximately 1,000 regular plots and 325 niches available for purchase. The District reported that the advent of "double depth" burials (i.e. burying one family member on top of another), in addition to the increasing demand for cremation interment sites, has significantly extended the usable years of cemetery land compared to decades ago. The District plans to add an additional 480 new niches on existing cemetery land within the next few years, as the need arises, and a reflection garden within the next 5-7 years. The District has capacity for an additional 1,000 plots in the undeveloped portion of the cemetery. The District attempted to purchase an additional 10 acres of land adjacent to the cemetery for future expansion in 2009; however, the District reported that it is no longer pursuing the purchase of this property due to difficulties surrounding financing and the current real estate market.

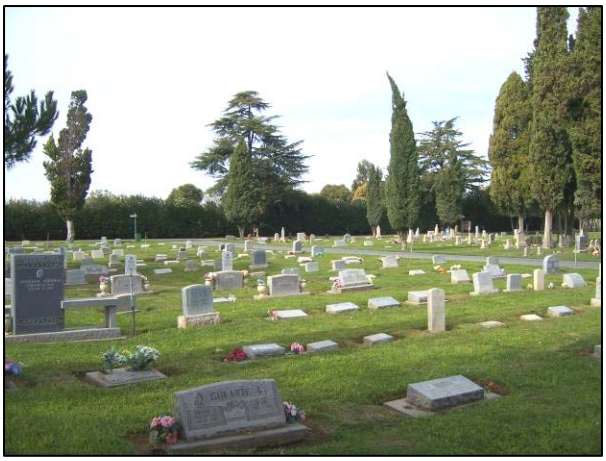
In terms of infrastructure needs, the District reported that it looked into installing solar panels at the cemetery, but due to the cost of County permitting and engineering (at upwards of $10,000), it is not fiscally possible. The District wanted to add solar panels in order to power the underground pumps used for watering the grass. Electricity to run the pumps costs approximately $20,000 per year, and the District estimated that the solar array would pay for itself in 15 years.

In terms of equipment needs, the District reported that one of the mowers will need to be replaced within the next two years.

[249] The number of occupied plots is based on District records since 1928. The District reported that there is an unknown number of additional burials that took place between 1878 and 1928 in the older portions of the cemetery that the District does not have records of. A goal of the District is to digitize and map the records on hand, in order to give a more comprehensive picture of historic burials. During the 50 years that the cemetery operated before the District was formed, families kept their own burial records, and many grave markers were made out of wood and disintegrated without proper care. Also, the District reported that from the 1920s into the 1960s, cremation burials and burials of children under the age of three were considered "non-persons," and very few records were kept of these burials.

The District reported that it does not share facilities due to the highly specialized nature of cemetery services, and there are no opportunities for shared facilities, because the only other public cemetery district is the Alamo-Lafayette Cemetery District, which is not contiguous with BBKUCD. The District reported that in the past it has occasionally supplied a caretaker to ALCD on a limited basis, with ALCD reimbursing the District for all costs. The District reported approximately 15 years ago it looked into collaborating with the City of Brentwood for contract mowing services, but it was determined to be economically infeasible.

Figure 12-2 Union Cemetery



GOVERNANCE ALTERNATIVES

Several governance structure options were identified for BBKUCD.

The eastern portion of the City of Oakley and a southeastern area of the City of Antioch extend into the BBKUCD boundary. The District identified two governance alternatives: detaching the portion of the District's existing boundaries that are within the City of Oakley (east of Sellers Avenue along Cypress Avenue to Bethel Island), or expanding the District's boundaries to include the entire City of Oakley (the territory west of Sellers Avenue and north of Delta Road to the Antioch City limit). Detaching the approximately 0.5 square mile (uninhabited) area of the City of Antioch within BBKUCD would seem to be the only logical governance alternative. Detaching the portion of the City of Antioch from BBKUCD would result in a loss of approximately $284 in property tax revenue per year, based on FY 07-08 allocations.[250]

The District reported that issues surrounding property taxes have stalled talks of annexation with the City of Oakley previously. When the City of Oakley was incorporated, it chose not to join BBKUCD because it did not want to lose property tax revenue to the District, and in recent years the City and District could not agree on a property tax transfer or mitigation payment if the remainder of the City were to be annexed to the District. The District reported that the City was willing to give the District a portion of the property tax increment, but the District wanted an additional mitigation payment from the City to compensate the District for years of service when surrounding communities supported the cemetery. While it may be unlikely that the City and District could reach an agreeable property tax settlement for the District to annex the remainder of the City, the District could choose to form a separate zone for the remainder of the City (pursuant to Health and Safety Code §9090 et seq.) where residents would be charged higher fees for service. Alternatively, the District may determine that it does not have the short-term capacity to provide cemetery service to a significantly larger area, or a sufficient fund balance to fund cemetery maintenance activities.

AGENCY MSR DETERMINATIONS

GROWTH AND POPULATION PROJECTIONS

1) LAFCO estimates that the residential population within the district is approximately 75,000. The District experienced significant growth from 2000 to 2008 in the City of Brentwood, and anticipates growth within the City to continue in the long-term.
2) There are 5,046 residential units approved for new development in the City of Brentwood, and a portion of the potential 1,215-unit Ginocchio development project is in the Brentwood planning area, west of the city limits.

[250] In FY 07-08, the City of Antioch Tax Rate Areas within BBKUCD paid $207.93 (TRA 01073) and $76.08 (TRA 01111) in property taxes to BBKUCD.

3) The eastern portion of the City of Oakley has also experienced significant recent growth, and future growth is anticipated in the City of Oakley's East Cypress Corridor Specific Plan area. The City of Oakley General Plan designates the East Cypress Corridor Specific Plan area for development of up to 5,763 residential dwelling units (including 544 existing residences), in addition to commercial, agricultural, recreation, and public facilities.

4) Growth in the unincorporated areas includes Discovery Bay, Byron Airport, and Delta Coves in Bethel Island. Development of the 1,100 acre Cecchini Ranch could eventually add 4,000 to 6,000 new residences east of Discovery Bay. Also, the Delta Coves project on Bethel Island may eventually add up to 495 new dwelling units within the District.

PRESENT AND PLANNED CAPACITY OF PUBLIC FACILITIES AND ADEQUACY OF PUBLIC SERVICES, INCLUDING INFRASTRUCTURE NEEDS AND DEFICIENCIES

5) No capacity issues were identified for BBKUCD. The Union Cemetery had approximately 1,000 regular plots and 325 niches available for purchase as of November 2009, and plans to add an additional 400 to 500 new niches on existing cemetery land within the next few years as the need arises. The District also has capacity for an additional 1,000 plots in the undeveloped portion of the cemetery.

6) The District provides adequate service given constrained financing. BBKUCD provides cemetery maintenance on a year-round basis. The District spends approximately $27,100 per acre on cemetery maintenance.

7) In terms of infrastructure needs, the District looked into installing solar paneling at the cemetery to power the underground water pumps; however, the project was determined to be financially infeasible to the high cost of permitting required by the County.

8) The District does not have a capital improvement plan. A written multi-year planning document could help the District plan capital expenditures, and would improve accountability.

FINANCIAL ABILITY OF AGENCIES TO PROVIDE SERVICES

9) The District's financial ability to provide services has improved over the last five years, due to an increase in development and sale of new homes in eastern Contra Costa County. The amount of property tax revenue received by the District increased by 47 percent from FY 05-06 to FY 07-08.

10) The District reported that the current level of financing is generally sufficient for adequate service provision. The District indicated that it plans to participate in the Proposition 1A Securitization Program to mitigate the impact of the loss of property tax revenues borrowed by the State.

11) BBKUCD indicated that their endowment care fees may be too low to cover long-term maintenance of existing plots. It is recommended that BBKUCD conduct a formal review of the adequacy of the endowment care fund to determine if the fund balance will be enough

to provide perpetual care to the cemetery facility once it has reached capacity and adopt appropriate and prudent fees.

STATUS OF, AND OPPORTUNITIES FOR, SHARED FACILITIES

12) The District does not practice significant facility sharing, and did not identify any potential facility sharing opportunities.

ACCOUNTABILITY FOR COMMUNITY SERVICE NEEDS, INCLUDING GOVERNMENTAL STRUCTURE AND OPERATIONAL EFFICIENCIES

13) The District demonstrated accountability and transparency by disclosing financial and service related information in response to LAFCO requests.

14) Accountability is also achieved by the District's various constituent outreach activities, including dissemination of meeting agendas to media contacts and interested parties, notifications and letters to the editor of local publications publicizing the cemetery as a place of historical significance, thanking volunteer groups or announcing changes. Further, the District maintains a website with information about District operations, services offered and contact information.

SOI RECOMMENDATIONS AND DETERMINATIONS

The existing SOI for the district is coterminous with its bounds. The SOI for the district was affirmed by LAFCO in 2004.

AGENCY PROPOSAL

The District identified expanding its SOI to include the entire City of Oakley as its desired SOI update.

SOI OPTIONS

Given the considerations addressed in the Municipal Service Review, four options are identified for the BBKUCD SOI:

<u>SOI Option #1 – Retain existing coterminous SOI</u>

If LAFCO determines that the existing government structure is appropriate, then the existing SOI should be retained. This option would leave the eastern portion of the City of Oakley (east of Sellers Avenue) within BBKUCD, and continue to exclude the western portion of the City (west of Sellers Avenue) from BBKUCD.

<u>SOI Option #2 – Expand the SOI to include the City of Oakley</u>

Expanding the SOI to include the portion of the City of Oakley west of Sellers Avenue would indicate that LAFCO anticipates that this area will eventually be annexed to BBKUCD.

SOI Option #3 – Reduce the SOI to exclude the City of Oakley

Reducing the SOI to exclude the City of Oakley from BBKUCD would indicate that LAFCO anticipates that the portion of the City of Oakley east of Sellers Avenue will eventually be detached from BBKUCD.

SOI Option #4 – Reduce the SOI to exclude the City of Antioch

Reducing the SOI to exclude the City of Antioch from BBKUCD would indicate that LAFCO anticipates that the 0.5 square mile area in the southeastern portion of the City of Antioch will eventually be detached from BBKUCD.

RECOMMENDATION

A more logical boundary for BBKUCD would exclude the small portion of the City of Antioch from BBKUCD, and would either completely contain or completely exclude the City of Oakley from BBKUCD. Detaching the City of Oakley from BBKUCD would negatively impact the interment eligibility for City residents and would result in a loss of approximately $6,800 in property tax revenue per year, based on FY 07-08 allocations.[251]

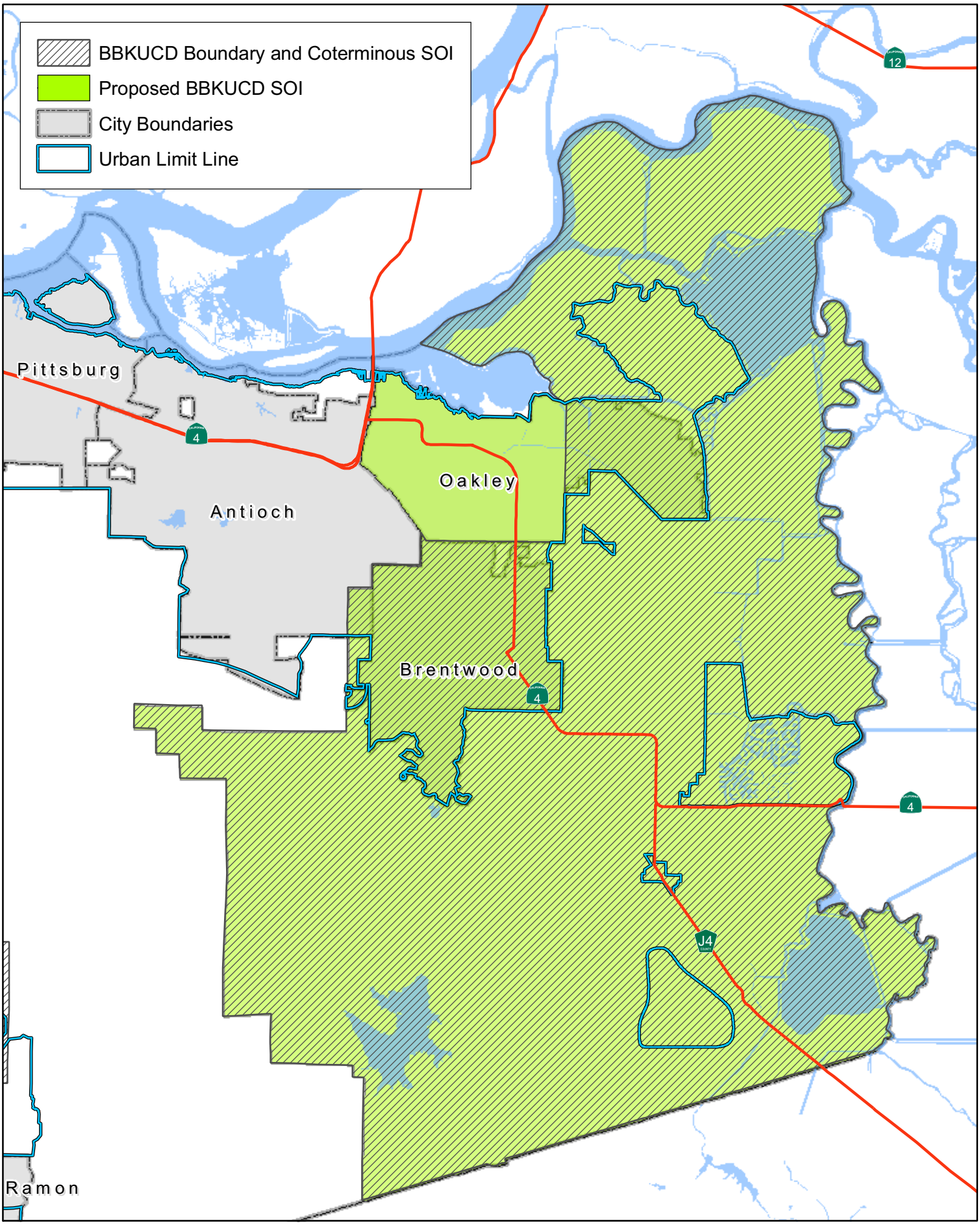
Before an SOI amendment can be recommended, however, the District must determine (a) whether a property tax transfer agreement or mitigation payment could be reached with the City of Oakley; (b) what fee for service would have to be charged in the zone of the district not contributing property tax if no property tax transfer agreement can be reached; and (c) whether the District has sufficient short-term capacity to accommodate a significantly larger service area with or without additional property tax. Furthermore, LAFCO may wish to require that the District conduct a formal study as to the adequacy of the endowment care fee and the necessary endowment fund balance to ensure perpetual care of the cemetery facilities, and adopt appropriate and prudent fees, before an SOI amendment is approved.

Lastly, it is recommended that the District collaborate with LAFCO staff and County GIS to verify that the appropriate district boundary is being used to determine residency (especially in regard to the area in the City of Antioch).

[251] In FY 07-08, the 13 City of Oakley Tax Rate Areas within BBKUCD contributed $6,836.27 in property taxes to BBKUCD.

Map 12-2

Byron Brentwood Knightsen Union Cemetery District SOI Expansion: Option Two



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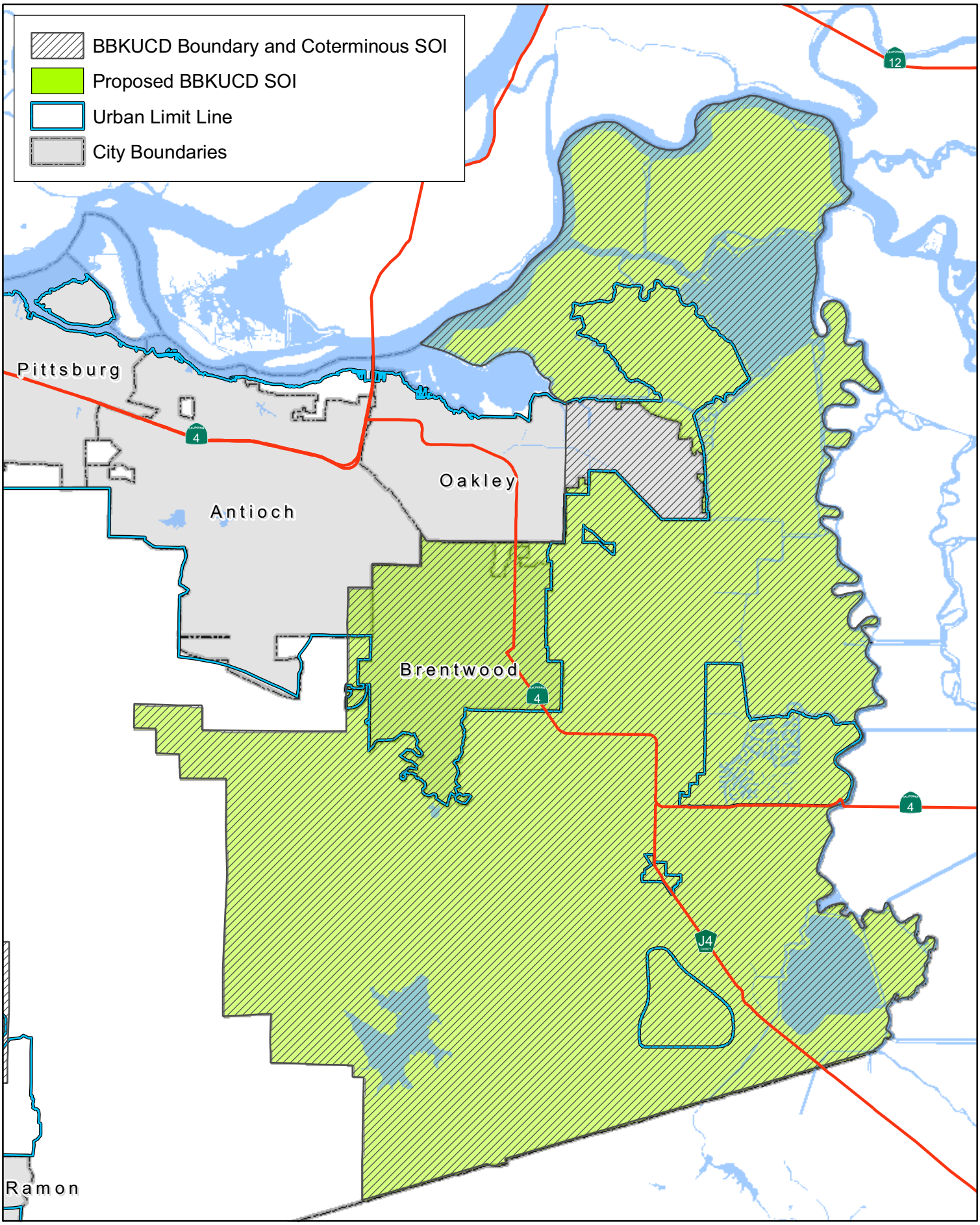
Map 12-3

Byron Brentwood Knightsen Union Cemetery District SOI Reduction: Option Three



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Map 12-4

Byron Brentwood Knightsen Union Cemetery District SOI Reduction: Option Four

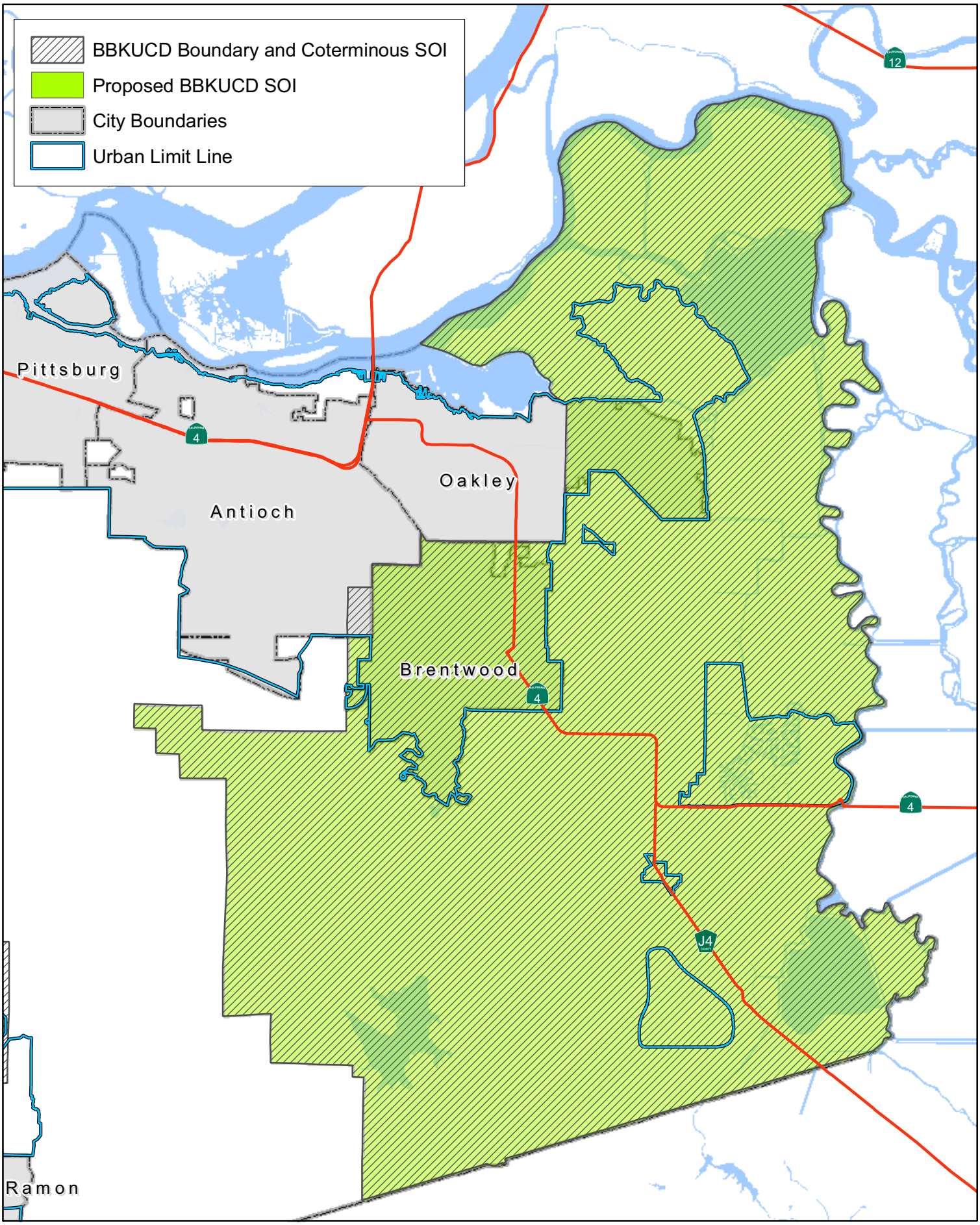

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Table 12-4: BBKUCD SOI Analysis

Issue	Comments
SOI update recommendation	SOI expansion west of Sellers Avenue, to include the entire City of Oakley, and SOI reduction to exclude the City of Antioch, pending property tax transfer and fee study materials, and capacity study submitted to LAFCO by District.
Services provided	BBKUCD provides interment, grave maintenance and record upkeep services to the Union Cemetery.
Present and planned land uses in the area	The District encompasses a variety of land uses and business activities, as it includes the City of Brentwood and community of Discovery Bay. Land uses in these areas consist primarily of low density residential and commercial. Other significant land uses within BBKUCD include agricultural land and open space.
Projected growth in the District/Recommended SOI	Build-out of the planned developments in the City of Oakley's East Cypress Corridor Specific Plan area (5,219 units), the Cecchini Ranch property (6,000 units) and the Delta Coves project (495 units) could add as many as 34,321 new residents to the District. The portion of the City of Oakley west of Sellers Avenue (in the SOI expansion area) has a population of approximately 32,700, and has a projected annual growth rate of 1.4 percent.
Present and probable need for public facilities and services in the area	There is a present and probable need for maintenance of the Union Cemetery for the foreseeable future.
Opportunity for infill development rather than SOI expansion	Opportunity for infill development is not relevant to the SOI for BBKUCD.
Service capacity and adequacy	No capacity or adequacy issues were identified in the MSR for BBKUCD. The Union Cemetery had approximately 1,000 regular plots and 325 niches available for purchase as of November 2009, and plans to add an additional 400 to 500 new niches on existing cemetery land within the next few years as the need arises. The District also has capacity for an additional 1,000 plots in the undeveloped portion of the cemetery.
Social or economic communities of interest	Social and economic communities of interest include the unincorporated communities of Byron, Knightsen, Discovery Bay, Bethel Island, the eastern portion of Morgan Territory, the City of Brentwood, the City of Oakley, and the Delta islands of Jersey, Bradford, Webb, Quimby, Holland, Palm, Orwood, and Coney, and a small portion of the City of Antioch.
Effects on other agencies	The recommended SOI update would impact the City of Oakley by requiring a property tax transfer or mitigation agreement with BBKUCD. If no property tax transfer agreement is reached, there would be no impact on the City. A small portion of the City of Antioch would be impacted if it were eventually detached from BBKUCD.

Potential for consolidations or other reorganizations when boundaries divide communities	There were no potential consolidation opportunities identified by the MSR.
Location of facilities, infrastructure and natural features	The Union Cemetery is located at 11545 Brentwood Boulevard, about half way between the City of Brentwood and the community of Byron. The District office and related facilities are located at the Union Cemetery.
Willingness to serve	The District indicated a willingness to continue to serve the aforementioned communities of interest and the Union Cemetery.
Potential effects on agricultural and open space lands	No potential effects on agricultural or open space lands were identified.
Potential environmental impacts	Although no potential environmental impacts were identified in the MSR, the LAFCO counsel and planner should make CEQA determinations.

REFERENCES

DATA SOURCES

Agency-specific data: responses to LAFCO Requests for Information, budgets, Comprehensive Annual Financial Reports, Capital Improvement Plans, General Plans, official statements, and miscellaneous plans.

Business and employment data: Dun and Bradstreet; County Business Patterns; Quarterly Census of Employment and Wages; California State Board of Equalization.

Demographic data: U.S. Bureau of the Census; Department of Finance.

Jobs and population projections: Association of Bay Area Governments; Department of Finance.

Long-Term Debt: California State Controller; MuniStatements; Moody's; Standard and Poor's; Comprehensive Annual Financial Reports.

Revenue: California State Controller; Contra Costa County Auditor/Controller; Comprehensive Annual Financial Reports.

INTERVIEWS AND CORRESPONDENCE

Agency	Name/Title
Alamo-Lafayette CD	Patricia Howard, Superintendent/General Manager
Ambrose RPD	Tarry Smith, General Manager
Ambrose RPD	Mary Jane Rodrigues, Administrative Assistant
BBK Union CD	Mark White, District Manager
County-Administered CSAs	Susan Cohen, CSA Coordinator
CSA M-29 (City of San Ramon)	Karen McNamara, Public Services Director
CSA M-30 (Town of Danville)	Rob Ewing, City Attorney
CSA R-4 (Town of Moraga)	Jay Ingram, Parks and Recreation Director
Pleasant Hill RPD	Bob Berggren, General Manager
Pleasant Hill RPD	Susie Kubota, Executive Secretary
Rollingwood-Wilart Park RPD	Charlotte Rude, Building Manager and Board Member